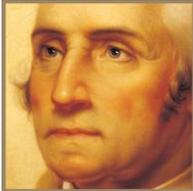


## WHITE PAPER



THE GEORGE WASHINGTON UNIVERSITY  
SCHOOL OF PUBLIC HEALTH  
AND HEALTH SERVICES

# THE NEXT GENERATION OF LONG-TERM CARE LEADERS

## Professionals Leading Passionate Innovation

2013 National Emerging Leadership Summit for Healthcare Administrators  
in Health and Aging Services | June 25-27, 2013

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## FORWARD

The National Emerging Leadership Summit's 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;
- Explore solutions for attracting and retaining other Generation X and Generation Y leaders.

The Summit combines current best-practices with a facilitated dialogue to provide a new perspective for both Summit participants and the broader field. This report is a reflection of the Fourth Annual National Emerging Leadership Summit, whose work is based upon the ideas and initiatives of the previous three Summits from 2010, 2011, and 2012. The 2012 Summit, however, served as the basis upon which the participants in the 2013 Summit developed their continuing and methodical agenda.

The 2013 participants made further strides to advance the foundational work from the 2010, 2011, and 2012 Summit recommendations and continue progress on the action taken by previous summit participants. 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;
- Setting a foundation for planning the 2014 Summit; and
- Serving as an additional resource for this next cohort.



## EXECUTIVE SUMMARY

The 2013 National Emerging Leadership Summit (NELS) brought together emerging leaders in the field of health and aging services administration from across the country. This fourth gathering of professionals reviewed the foundational work of the 2010 and 2011 NELS participants, along with the work and continued progress of the 2012 NELS group, and set out to clarify and refine the needs and opportunities for future leaders in order to advance the profession. This white paper reflects the information presented to attendees, the discussions attendees had over pertinent issues to the health and aging services administration field, and the action plans formed as a result of participation in the 2013 Summit. Included in this paper are calls to action, attendee perspectives, session summaries, and participants in the 2013 NELS Summit.

During the Summit, the five thematic areas identified by the prior 2012 NELS participants and the perspective of the current 2013 participants framed the Summit discussions. This paper will discuss each of the 2013 NELS recommendations, providing a definition for each and including a detailed action plan for each, from which future actions and agendas can be developed. The recommendations from the 2013 NELS participants included the following:

- Improving the public image and perception of health services administrators;
- Increasing the accountability of NELS participants and creating a forum for discussion;
- Reducing barriers for entry into the profession and heightened recruiting efforts; and
- Publishing the 2013 recommendations and action plans in a white paper.

In the development of each of these recommendations, the Summit participants formed committees of interested participants to develop action plans to carry forward both the work already performed by the 2010, 2011, and 2012 NELS participants and the new initiatives formulated this year. The Generation X and Generation Y health care administrators in aging services participating in this Summit demonstrated their willingness and ability to transform the profession and strengthen the demand for NELS and its activities. The committees formed during the Summit designated timeframes to accomplish their goals and developed detailed plans to move the work forward to begin the process of transforming the long-term care administration profession.

The steering committee and 2013 NELS participants reviewed this paper prior to this broader dissemination. The information noted in this document is a reflection of the voice of the 2013 NELS participants, yet there is an obvious interest in beginning an effort to invite all NELS participants and interested stakeholders to participate and support achieving the next phase of this important work. The NELS steering committee presented these recommendations to sponsoring organizations, and will use this White Paper as a planning mechanism for the 2014 NELS Summit to continually cultivate future “professionals leading passionate innovation.”



## BACKGROUND

With unprecedented growth rates for the older adult population, the United States faces a tremendous challenge to improve and maintain the quality of care and service provided in long-term care (LTC) organizations. Data from the U.S. Census Bureau estimated that the elderly population (those aged 65 and over) accounted for nearly 15% of the American population in 2010, and will account for nearly one quarter of the population by 2050.<sup>1</sup> As Americans live longer, and with more co-morbidities than ever before, the associated costs of providing quality care grows incrementally and the stresses to our nation's long term care system mount.

Data from the Centers for Medicare and Medicaid Services (CMS) determined the 2009 national health care expenditures to be over \$2.4 trillion, of which approximately 10% is directly attributed to nursing home and home health services. CMS projections estimate that in 2019, the total national health expenditures will be nearly \$4.5 trillion, with nursing home and home health services expenditures being nearly \$400 billion.<sup>2</sup> The 2009 total healthcare expenditures account for 17% of the gross domestic product (GDP), and projections indicate that it will consume nearly 20% of the GDP by 2019.<sup>3</sup> Internationally, the Organization for Economic Cooperation and Development (OECD) estimated in 2005 that LTC expenditures accounted for about 1% of the GDP in OECD countries<sup>a</sup>, and it projects this percentage to double and even quadruple by 2050. "Spending on long-term care, as a share of GDP, rises with the share of the population that is over 80 years old, which is expected to triple from four percent to 11-12 percent between 2005 and 2050 [in OECD countries]." <sup>4</sup>

Healthcare reform legislation in the United States creates a daunting challenge for LTC administrators to improve quality while reducing costs. Current administrators struggle with numerous challenges including meeting the needs of a multigenerational workforce, an increasing workforce shortage, changing regulatory demands, maintaining quality services across the continuum of LTC organizations, and addressing the public's overall negative perception of long-term care and services. Working in long-term care administration requires individuals to be versatile and dynamic to successfully manage all of the challenges.

LTC organizations and services range from skilled nursing facilities, nursing homes, assisted living settings, continuing care retirement communities, home care, hospice, and daycare services. Each of these settings targets the same older adult population, but often lacks the coordination and integration needed to offer residents and their families a comprehensive mix of services. Many recognize there is a need to prepare future LTC leaders to work beyond silos of service and adapt to the changing consumer demands. This work includes integrated service delivery in a new resident-centered health model of care.

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<sup>a</sup> OECD countries include: Australia, Austria, Belgium, Canada, Chile, Czech Republic, Denmark, Finland, France, Germany, Greece, Hungary, Iceland, Ireland, Israel, Italy, Japan, Korea, Luxembourg, Mexico, Netherlands, New Zealand, Norway, Poland, Portugal, Slovak Republic, Slovenia, Spain, Sweden, Switzerland, Turkey, the United Kingdom, and the United States.



Since 1998, the number of nursing home administrator examinations administered to candidates seeking initial licensure declined by more than 40%, with only a slight increase in recent years.<sup>5</sup> LTC is facing an employment cliff with more people leaving the administrator profession than entering it. In addition, during testimony before the Senate Special Committee on Aging Forum, several professionals and professional organization representatives in the field of LTC administration remarked that the average age of persons taking the LTC administrator examination has been increasing in recent years.<sup>6</sup> 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.<sup>7</sup>

In addition to the breadth of services provided and the decline of LTC administrators, the LTC administration profession struggles with one of the highest staff turnover rates nationally. Factors that contribute to the turnover rate include low pay, poor benefits, inadequate training, limited opportunities for career advancement, and heavy workloads. The combination of the increasing demand for these services, the disjointed system currently in place, and the imperative to reduce cost while improving quality all requires strong leadership to champion improvements in the delivery system. A driving force and impetus to organize the NELS included the need to understand how to increase, improve, and support the value of the administrative profession for future leaders.

The current and future generation of administrators varies tremendously from previous generations. Baby Boomers (born between 1946 and 1964) feel defined by their jobs and remain very loyal to an organization. This generation willingly works long hours and sacrifices family time to succeed at work. The Boomers' children struggled with this demanding work ethic and its impact on family time. Generation X individuals (born between 1965 and 1981) strive to be more successful in balancing work and family time, and are willing to change jobs to achieve an optimal work-life blend. Generation X adapts to technology and finds creative ways to achieve their goals. With the growth of more technology, the next generation is even more proficient in integrating technology in the workplace. Generation Y (born between 1981 and 2001), also known as Millennials, further demands a better work life balance and attempts to do this by integrating more technology into the work place.<sup>8</sup> These three generations comprise the current LTC workforce. This multigenerational workforce adds to the complex environment LTC administrators must handle.

LTC leaders recognize the need to restructure and re-energize the LTC administration profession. As the national and international crisis to address the needs of an aging population continues, the NELS provides a venue to address the field's most pressing professional challenges. This energy from the field and NELS has also mirrored recent progress to advance evidence based research focused on improving the standards of practice of this professional discipline. A steering committee composed of leaders from higher education and professional associations tasked itself with addressing leadership challenges within the LTC administration profession. To address the many facets of the LTC administrative profession, the NELS brought



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 administration profession, and also recognize and accept the responsibility to effect and realize the needed change. LTC administration requires the best and brightest individuals leading these critical human service organizations to provide and coordinate the highest level of care for elders.

The 2010 NELS established a framework that identified four key issues that need to be addressed. These recommendations included:

- Community-oriented activities;
- Participating in professional association activities;
- Becoming active change agents; and
- Identifying and addressing barriers to entry.

The 2011 NELS group built upon the work conducted by the 2010 Summit participants, refining those recommendations and adding further action areas, which included:

- Developing standardized state licensure and reciprocity agreements;
- Supporting the effort to standardize the long-term care vocabulary;
- Identifying and supporting the development of mentoring opportunities;
- Creating a marketing plan and beginning to promote the NELS as an event for professionals leading passionate innovation; and
- Publishing the 2011 NELS recommendations and action plans in a white paper.

The 2012 NELS participants followed the lead of their predecessors, advancing prior initiatives and developing an additional set of recommendations, to include:

- Participant accountability and NELS promotion;
- Partnering with involved associations and organizations;
- Mentoring future leaders in the long-term care administrator profession;
- Community outreach and publicity; and
- Publishing the 2012 NELS recommendations and actions plans in a white paper.

The 2013 NELS agenda placed an emphasis on developing strategic action plans to address recommendations made by prior NELS participants and to begin addressing the current challenges. Combining their recommendations of future work with developed action plans, the 2013 participants identified NELS as a venue to facilitate needed change within the long-term care administration profession. The 2013 participants embraced the goal and vision developed by prior cohorts of NELS participants of "professionals leading passionate innovation," while moving forward with recommendations to continue the success of the NELS program.



## PURPOSE OF SUMMIT

The 2013 NELS participants' perspectives, surveyed prior to the commencement of the Summit, served as the framework to advance discussions about the need to change, and the methodologies by which to change, the LTC administration profession today and into the future. The participants shared a variety of experiences and trends that helped them gain a broader view of possibilities in their careers. These experiential approaches and mechanisms provided an environment and foundation for an engaging and thoughtful discussion about the future generation of LTC administrators. Participants had the opportunity to access professional organization representatives and legislative staff during their D.C.-based summit (see Appendix A for the agenda each day of the Summit). Throughout the Summit proceedings, participants had the opportunity to reflect on creating a better profession for themselves and future generations while at the same time leading organizations and systems with coordinated, high-quality, yet low-cost, LTC services.

The 2013 participants received information from a 2012 NELS representative to learn how and why the 2012 recommendations were identified and how those recommendations evolved from the 2010 and 2011 NELS Summits. At the conclusion of this three-day Summit, these current emerging leaders developed detailed and methodical action plans, targeting specific areas of the long-term care administrator profession, to revitalize the profession. The action plans advance the recommendations and work of prior NELS participants and address a breadth of current issues to ultimately improve the profession and attract more potential administrators from Generation X, Generation Y, and Generation Z (those individuals under the age of 25).



## SUMMIT PARTICIPANTS AND STRUCTURE

NELS primarily focuses on long-term care administrators who typically have been in the field for less than ten years and/or are under forty years of age. These Generation X and Generation Y leaders hold positions in skilled nursing facilities, nursing homes, assisted living communities, continuing care retirement communities, rehabilitation hospitals, or aging service agencies. In order to attend the NELS, participants submitted an application to the steering committee, which included a professional reference and a personal statement outlining their experience in and commitment to long-term care.

Upon selection, participants completed a pre-Summit survey (see Appendix B) from which the committee learned about attendee demographics, work experience, and work preferences. The average age of the 2013 participants was 31 years old, and the majority of participants were either single or married without children. The greatest percentage of participants' tenure in their current long-term care (LTC) service setting was 1-2 years, which was followed closely by those in their LTC service setting for 3-5 years. With regard to education, all participants of the 2013 NELS summit had a four-year bachelor's degree, and a significant number also had pursued further education (e.g., Master's degree). The primary reasons these individuals enjoy their jobs include the variety of tasks required for their job, the importance of resident and family interaction, and the opportunity for professional development. On the other hand, the regulatory environment, financial constraints, and the public's negative impression of the LTC industry all challenge the participants to feel satisfied with their positions, which were identical to the 2012 NELS participants' self-reported challenges. Other 2013 NELS participant perspectives included the following:

- From the vantage point of the 2013 participants, they felt that potential LTC leaders do not pursue a professional career in the LTC field because of its challenging work climate and because of a lack of awareness of the field.
- Approximately 74% of NELS participants reported that they belonged to a professional association, a slight decrease from prior years' participant involvement. Organizations surveyed included the American College of Health Care Administrators (ACHCA), LeadingAge, and the American Health Care Association (AHCA). The main rationale provided for not being involved was constraints on participant time from work duties.
- Early job experiences, referral by a colleague, and/or an educational track served as the three most common ways these professionals entered the LTC administrative field, which was consistent with previous cohorts.
- While the majority of participants worked between 41-60 hours per week, they also indicated they were either "satisfied" or "very satisfied" with their career and that they expect to advance within their current employment setting in the next five years.
- Mentoring played a significant role in career choice and success, with 88% of participants reporting they had one or more mentors in the LTC field (an increase from prior years' participants).



By understanding the background and perspectives of the 2013 NELS participants, the steering committee ensured that Summit presentations emphasized the importance of actively engaging them in activities to meet the following goals:

- Identify mechanisms to overhaul the public perception of the LTC profession;
- Develop interdisciplinary interactions between LTC providers within a community; and
- Create an understanding of the legislative process.

**Robert Burke, Ph.D.**, Professor and Chair of the Health Services Management and Leadership Department at The George Washington University, opened the Summit by providing welcomes from the Dean of the School of Public Health and focusing on the importance of the LTC field. Dr. Burke highlighted the evolution of the NELS conference and discussed the current state of the field, including challenges to address. He also highlighted the importance of leadership practices designed to transform the LTC administrator field, and spoke of the main five areas of importance for participants: accountability in promoting the NELS conference, partnering with association representatives attending the Summit, mentoring opportunities for the future, establishing positions as community leaders, and working to disseminate the work accomplished during the Summit.

**Doug Olson, MBA, Ph.D.**, Director of the Center for Health Administration and Aging Services Excellence at the University of Wisconsin – Eau Claire, discussed the importance of NELS and of listening to participants as the future leaders in the LTC field. Dr. Olson spoke of the work conducted by prior NELS cohorts, but challenged the participants to take their work to the next step, in whatever direction the 2013 participants saw as viable, and to take ownership of the next steps of the NELS work. He articulated the importance of the participants determining where the “bar” is set for other professionals in the field. To help participants learn about one another, Dr. Olson had participants speak to what the NELS mission of “professionals leading passionate innovation” meant to them, along with creating a picture in groups to depict this message.

Dr. Olson and **Stephanie Ritter**, Housing and Services Director at Benedictine Health System and a 2012 NELS participant, also discussed the pre-Summit survey results and highlighted the rationale behind the 2012 NELS recommendations. Dr. Olson highlighted key characteristics describing the multigenerational work, and facilitated a discussion with 2013 participants that continued over the three days of the NELS Summit. Dr. Olson urged participants to critically think about how LTC administrators can induce nationwide changes for the LTC profession by reflecting on the experiences and presentations from peers and industry experts.

The NELS structure was created to encourage participants to think beyond their day-to-day essential work responsibilities and to evaluate the administrator profession from a broader perspective. Multiple sessions and discussions resulted in a crystallization of themes and recommendations to help change the face of the LTC administrative profession. The overall experience and results have received favorable reviews from participants, sponsors, steering committee members, and those who have been engaged in this effort.



# SUMMIT RECOMMENDATIONS

Strategically hearing the voice of Generation X and Generation Y LTC leaders and working to develop recommendations based upon their experiences and perceptions was paramount during the NELS Summit. Over the course of the three days, the 2013 NELS participants reviewed and elaborated on the 2012 NELS recommendations, summarized below. Organized into distinct, participant-defined groups, the attendees worked together to brainstorm ideas that were shared with the broader group. Michael Muetzel and Dr. Olson facilitated, solicited, and subsequently compiled the participants' perspectives to reflect the consensus of the group.

The following are the 2012 NELS recommendations that the 2013 participants used as a framework:

## ***2012 Recommendation 1: Participant Accountability and NELS Promotion***

This recommendation focuses on the need to continue progress from one NELS Summit to the next, and also encourages peer accountability to develop the various recommendations made by NELS participants. The recommendation also highlighted the need to develop various outlets in which to promote the NELS Summit among current members and within the LTC field.

## ***2012 Recommendation 2: Partnering with Associations and Organizations***

Participants from the 2012 NELS Summit identified the need to work collaboratively with associations and organizations who have an established "voice" in the LTC field and who see value in the work of the NELS participants. The message from the NELS Summit and from its participants would have greater weight if presented to partnering associations and organizations, to achieve greater efficacy in revitalizing the profession.

## ***2012 Recommendation 3: Mentoring Future Leaders in Long-Term Care***

The focus of this recommendation stems from recognizing the need to improve the public perception of the LTC administrator profession. The NELS participants felt it important to reach out to undergraduate students who are currently pursuing education for a LTC administrator position and to those would be ideal candidates for a LTC administrator role. The participants felt it important to pursue an effort that allowed them to serve as mentors for future leaders and improve the public image of the profession at the same time.

## ***2012 Recommendation 4: Outreach to Publicize the NELS Program***

The participants of the 2011 NELS Summit felt strongly about the need to invest time and energy to share the message, purpose, and values of the NELS Summit within numerous areas of the LTC field. As a separate focus as part of this recommendation, participants also recognized the ability to have a positive impact on the public



perception of the LTC field through the publicizing of the NELS participants' work in improving and transforming the LTC administrator profession.

***2012 Recommendation 5: Publish the 2012 Recommendations and Action Plans***

The 2013 NELS participants and steering committee concurred in the need to capture the work completed during this three-day Summit for broader dissemination to stakeholders, associations and organizations, other interested parties, and future NELS attendees. The white paper, and its accompanying legislative summary, both serve to educate the greater LTC profession and the general community of the efforts undertaken at the Summit to transform the image and face of LTC administration.

These recommendations established the framework from which the 2013 NELS participants started to develop formal action plans to help advance the profession and the work of future NELS gatherings. The action areas and plans from the 2013 NELS Summit address some aspects of the 2012 NELS recommendations, and they establish both a strategic plan and key partnerships necessary for success. (Please see Appendix C for detailed action plans.) The following summarizes each action area:

***2013 Action Area 1: Improving the Public Image and Perception of the Profession***

**BACKGROUND:** In an effort to improve the public persona of the LTC administrator profession, this committee felt the need to reach out to various forms of media (e.g., social media outlets, blogs, magazines, community organization publications) and present the human message from those within the profession. While the purpose and outcomes of the NELS Summit, and the LTC administrator profession itself, were seen as very beneficial to those in the field, the committee also felt the need to disseminate a broader message in an attempt to attract future leaders to the profession and achieve an improved public perception of the profession.

**PARTNERS:** The committee felt the need to reach out to former NELS participants and also work with the associations and organizations that help direct the work of NELS. Also, the need to partner with state-level associations was expressed by the committee, and included outreach to state Ombudsman agencies for further partnership. Participants wanted to include local political leaders in their efforts and also popular authors of newspaper articles and blog sites. Lastly, partnering with universities and their faculty to speak to their students or to identify students to reach out to was also seen as necessary to accomplish the committee's goals.

**ACTION PLAN:** The committee identified the need to define the image of the LTC administrator profession and craft a message for wider dissemination. Participants also saw as necessary a strategy to identify outlets in which to promote and deliver the message, once created. The action plan for this committee also includes the creation of an educational campaign and tools to use for ease of distributing the message to the outlets identified by the committee. In addition, members of this committee felt that



evaluations of effectiveness should be undertaken once members begin to disseminate the information, to determine if any necessary modifications should be made.

### ***2013 Action Area 2: Increasing the Accountability of NELS Participants***

**BACKGROUND:** The committee identified the need to continue progress from one NELS Summit to the next, and felt peer accountability mattered a great deal in taking great strides to develop the NELS recommendations. The group strategized about how to monitor and support the progress of overall 2013 NELS objectives and how to best facilitate and encourage NELS 2013 communication within and between the various committees. In addition to current attendee accountability, the committee discussed a strategy that could be used to include prior NELS Summit attendees.

**PARTNERS:** To be successful in its endeavors, the committee identified several groups with which partnering would be beneficial for all involved to accomplish the goals of the committee. The partners identified by the committee included the National Association of Long-Term Care Administrator Boards (NAB), the American Health Care Association (AHCA), LeadingAge, the American College of Health Care Administrators (ACHCA), and faculty in established LTC administrator programs within universities. Also, the committee relied upon prior and current NELS attendees as partners to achieve this recommendation.

**ACTION PLAN:** To achieve the goal of monitoring progress on 2013 initiatives, the committee planned to pursue the implementation of a multimedia platform (e.g., BaseCamp) to allow for greater communication, especially given the geographical distance between NELS participants. Such a platform would allow NELS directors and participants to use its work management tools for assigning tasks and virtual meetings, and it would also include a free app for mobile devices. The committee made plans that, once the platform was established and tested for reliability, to use it to assist groups in completing necessary tasks for developed action plans. Lastly, the committee articulated the need to include NELS alumni once the current NELS attendees had been using the platform successfully, with a goal of inclusion by January 2014.

### ***2013 Action Area 3: Reducing Barriers for Entry Into the Profession and Recruiting***

**BACKGROUND:** As indicated in prior NELS cohorts, this committee discussed the importance of attracting future talented leaders to the profession and identified the barriers for entry that need to be addressed. The discussion from prior years of standardized licensure criteria and state reciprocity agreements surfaced in this committee's work, as well. The committee members also saw as necessary heightened recruitment efforts to attract talented individuals who may not have considered a career in the LTC administrator profession, an initiative which requires outreach to existing academic programs for future LTC administrators and partner associations.



**PARTNERS:** The committee identified the need to work primarily, at the onset, with two key partners from the NELS Summit: the American College of Health Care Administrators (ACHCA) and the National Association of Long-Term Care Administrator Boards (NAB). In addition, the group emphasized the importance of reaching out to existing LTC administration programs at universities across the United States, including NAB-accredited and non-NAB-accredited programs, to partner with faculty members in recruiting talented students to this noble profession. Group members discussed the universities to whom they had a connection and set forth to plan which universities they would need to contact.

**ACTION PLAN:** The group set a plan to reach out to the respective leaders of ACHCA and NAB to discuss logical next steps for standardization of licensure requirements and any potential further state reciprocity arrangements that could be pursued. Also, the committee planned to reach out to state association representatives to assist in working with legislative leaders. Committee members recognized the need to develop a list of various state licensure requirements to assess commonality and differences to aid in this endeavor. Lastly, members planned to develop contact strategies for universities without alumni in the NELS cohorts, and to begin outreach efforts once the list had been completed.

#### ***2013 Action Area 4: Publish the 2013 Recommendations and Action Plans***

**BACKGROUND:** The NELS gathers early to mid-career administrators who are eager to improve the greater LTC community as well as the administrator profession by identifying and addressing the challenges affecting personal and professional growth. Learning about generational differences, factors affecting policy development, and current best practices poise participants to become professionals leading passionate innovation. To share the 2010, 2011, and 2012 achievements, the steering committee published a white paper that served as a foundation for subsequent NELS summits.

**PARTNERS:** The leaders of the NELS Summit, from the University of Wisconsin – Eau Claire and The George Washington University, will work with 2013 NELS participants and the 2013 steering committee to capture the current Summit’s activities and strategic action plans. These efforts will be pursued in conjunction with a doctoral student from the School of Aging Studies at the University of South Florida, and an undergraduate student from the University of Wisconsin – Eau Claire.

**ACTION PLAN:** This white paper, and the accompanying legislative summary, both serve as a mechanism to educate the greater LTC profession and the general community of the efforts being made to transform the image and face of LTC administration. The NELS Summit organizers, doctoral student, and undergraduate student will create an initial draft of the white paper to submit to both the steering committee and the 2013 NELS participants. Upon collective review and agreement, the paper will be published in the fall of 2013 through professional associations’ respective websites and publications. The



findings from the 2010, 2011, 2012, and 2013 NELS Summit pre-surveys and recommendations will serve as a foundation for a future research article, as well.

The development of multiple committees to support the identified action initiatives and the commitment to action plans demonstrates the readiness of these talented Generation X and Generation Y administrators to transform the LTC administrator profession and strengthen the demand for the NELS Summit. Each action area identified a specific mechanism to address many of the recommendations defined during previous NELS Summits, including:

- Addressing the negative stigma associated with LTC by becoming more engaged and raising positive awareness in the community and within professional organizations;
- Reducing the barriers to recruiting and retaining talented individuals; and
- Increasing participation in professional associations by partnering with and supporting current programs to deliver the NELS message and work to a broad audience of professionals.

The committees for each strategic activity plan to meet quarterly to begin the process of transforming the LTC administrator profession. To maintain group continuity and cohesiveness, the committees identified internal leaders who would collaborate with steering committee members to develop and meet key milestones for each strategic area. An effort will be made to invite the 2010, 2011, and 2012 NELS participants to contribute and support achieving the next phase of this work. Every one of the past and present NELS participants are the epitome of professionals leading passionate innovation. From a broader perspective, the NELS participants and steering committee are actively developing strategic partners that will serve as efficient connections to leverage existing resources and initiatives that will help promote the transformation of the LTC administrator profession for current and future generations of leaders.



## CALL TO ACTION

To demonstrate the growth and evolution of the NELS over the four years of its existence, the overall findings from the 2013 NELS included:

1. Improving the public perception and public image of the LTC administrator profession, through the work of the NELS participants;
2. Concisely describing the work being done by the Summit;
3. Ensuring the continued accountability of NELS participants and committees through the strategic use of technology;
4. Reducing the barriers for entry into the LTC administrator profession, including both advancing standardized licensure requirements and reciprocity agreements; and
5. Recruiting and retaining future leaders who are talented and dedicated to excellence in leadership and in continuing the positive transformation of the LTC administrator profession.

The action plans presented above highlight the 2013 NELS participants' intent to actively address the recommendations defined during the 2010, 2011, and 2012 Summits, emphasizing the need for accountability and partnership to succeed in achieving the important goals outlined by past and present participants.

Each of the 2013 participants recognized the necessary energy and time required to begin transforming the LTC administration profession both internally and externally. Developing the action plans with timelines provides evidence that these Generation X and Generation Y leaders desire to address the issues affecting them as individuals and as a collective group. It is timely that these LTC administrators recognize the need to improve the community's perception of their profession, as well as LTC providers and organizations because this affects each of them as well as their staff, residents, families, and their communities at large. The result of this improvement framework will include bringing the necessary attention to issues that create challenges in attracting and retaining capable and competent administrators. It is imperative that these individuals provide higher quality services at lower costs in order to achieve the greatest success. The national impact will be felt through the improvements and commitments made by strong leaders for their chosen profession.

Participants from the 2010, 2011, and 2012 NELS Summits dedicated time, energy, and passion to revitalizing the LTC administrator profession and the 2013 participants both acknowledged and adopted that same fervor in implementing action plans and realistic timelines to accomplish the identified goals. Over the next year, the work accomplished by each committee and the partnerships with professional associations and universities will be shared using key platforms, including LinkedIn, Facebook, and respective association websites and journals.



After six months, all of the NELS participants will receive a post-Summit survey to gauge individual and professional growth. Capturing this data enables the steering committee to quantify the value of attending the NELS Summit. The authors of this paper are also committed to moving forward with a comprehensive paper underscoring both consistent and new thematic areas, along with commenting on the challenges and progress of this exceptional group of emerging leaders over the years. Understanding the value of the Summit and demonstrating successful progress in each strategic area will help formally mark the onset of transformation within the LTC administration.

Thank you for taking the time to read and review this fourth annual White Paper reporting on the progress and results of this critical effort. Please utilize this document to help advance related efforts for the health and aging services administration field. We also welcome any feedback on this report, and encourage any interest in future National Emerging Leadership Summits planned for the years ahead.

*Any correspondence regarding this white paper, its recommendations, appendices, or the 2013 NELS Summit, should be sent directly to:  
Dr. Douglas Olson, University of Wisconsin – Eau Claire (olsondou@uwec.edu).  
For further information on the 2013 NELS Summit, please visit:  
<http://www.gwumc.edu/ltcsummit>.*



## SUMMIT PROCEEDINGS

**Robert Burke, Ph.D.**, Professor and Director of the Health Services Management and Leadership Department at The George Washington University, welcomed the participants to the 2013 National Emerging Leadership Summit for Long Term Care Administrators. He expressed excitement about bringing such a diverse, energetic group of people together who have the potential to significantly influence the field of LTC and provided a valuable overview of the history and evolution of the NELS Summit. Dr. Burke discussed the current state of the LTC administration field, including challenges to address and existing research to use for transformation of the profession. He also highlighted the importance of leadership practices designed to transform the LTC administrator field, and spoke of the main five areas of importance for participants: accountability in promoting the NELS conference, partnering with association representatives attending the Summit, mentoring opportunities for the future, establishing positions as community leaders, and working to disseminate the work accomplished during the Summit.

Following Dr. Burke's welcoming presentation, **Douglas Olson, Ph.D.**, Associate Professor of Health Care Administration and Director, Center for Health Administration and Aging Service Excellence, University of Wisconsin-Eau Claire, welcomed the participants and thanked the NELS attendees for their dedication to the LTC administrator profession as well as their commitment to improving the profession. Dr. Olson discussed the importance of NELS and of listening to participants as the future leaders in the LTC field. He spoke of the work conducted by prior NELS cohorts, but challenged the participants to take their work to the next step, in whatever direction the 2013 participants saw as viable, and to take ownership of the next steps. He articulated the importance of the participants determining where the "bar" is set for other professionals in the field. To help participants learn about one another, Dr. Olson had participants speak to what the NELS mission of "professionals leading passionate innovation" meant to them, along with creating a picture in small groups to depict this message.

Dr. Olson reviewed the current environment and perspectives in LTC and LTC administration. The changing labor force, fragile educational field, and unfavorable public perception of LTC are proving to be considerable challenges for moving the field forward. He also reviewed different models of leadership and change to give the participants a foundation for initiating adjustments. Dr. Olson reminded the participants that being leaders in this field includes carrying the responsibility to be proactive change agents. He concluded the session with several ideas to help them throughout the 2013 NELS Summit: have a clear vision, desire change, be open to communication, maintain a visible presence, and uphold a set of values.

**Stephanie Ritter**, Housing and Services Director at Benedictine Health System and a 2012 NELS participant, and **Dr. Olson** provided an overview of the 2012 NELS Summit and the participants' recommendations. They described the key takeaways and five thematic areas that the 2012 participants thought were most essential. Together, Ms. Ritter and Dr. Olson discussed the



importance of making the NELS sustainable, and the importance of collaboration between current and future leaders of the field.

Following the group discussion, **Dr. Olson** explained the findings of the 2013 participants' pre-NELS survey responses. Using this as a platform, he engaged the participants in an active discussion about the reasons contributing to varied perceptions of the LTC administration profession. Several reasons included educational barriers and global misunderstanding of what LTC administrators actually do. The group collectively agreed that work needs to be done to help the public understand what a LTC administrator does, and the difficulty and importance of the role within LTC communities. As a result, the participants discussed different mechanisms that can be developed to help educate the public, such as developing newsletters, partnering with universities and professional organizations, marketing, and increasing participants' personal amount of NELS involvement and community involvement. Energized by interaction and brainstorming, the group was prepared for the next two days of interacting with LTC and legislative leaders.

As part of the fourth annual NELS, Summit participants attended a legislative forum at the United States Senate, where experts and representatives of professional organizations discussed contemporary implications of various aspects of the LTC administrator field. The panel of experts and practitioners convened to discuss and move forward recommendations made by the 2012 cohort of NELS participants, primarily addressing the current state of educational programs across the country for new health and aging services administrators. Following the welcomes by **Douglas Olson, Ph.D.**, Associate Professor of Health Care Administration and Director, Center for Health Administration and Aging Service Excellence, University of Wisconsin-Eau Claire, and **Oliver Kim, J.D., LL.M.**, Deputy Director, U.S. Senate Special Committee on Aging, on behalf of Senator Bill Nelson (D – FL), the Chairman of the Special Committee on Aging, the panel weighed in on the issues facing the field of health and aging services administration.

**Peter Corless, MBA**, representing the American Health Care Association (AHCA) and the National Center for Assisted Living (NCAL), began testimony with an overview of the two programs and two of the educational programs sponsored by AHCA: the Future Leaders Program and the Political Ambassador Program. Mr. Corless discussed the challenges to long-term care education, highlighting the variation in administrator-in-training (AIT) programs across states, the lack of younger administrators entering the profession, and the decrease in retention of skilled administrators. He suggested greater partnership efforts to promote licensure portability and enhance programs at universities. Mr. Corless discussed the “blurring” of distinctions in the various post-acute care settings, and challenged the group to account for this in future work.

**Bonnie Kantor-Burman, Sc.D.**, from the Ohio Department of Aging Services, began her testimony with a personal story to emphasize the need for leadership in long-term care. Dr. Kantor-Burman called for the enhancement of a robust education system, along with a better strategy to sell the “product or profession” to those who might clamor for it. She also



recommended that, with increased training, there should be incentives considered for those who bring quality leadership to the long-term care profession. Dr. Kantor-Burman advocated that it costs less to provide high-quality care that is both preventive and integrated; arguing that we should teach what “should be” rather than “what has always been.” She suggested that the profession engage state and Federal leaders in this initiative, ensuring long-term care leaders are effective agents of change.

Representing the National Association of Long-Term Care Administrator Boards (NAB) and the American College of Health Care Administrators (ACHCA), **Keith Knapp, Ph.D.**, expressed the need to have a consistent standard of performance for individuals in the long-term care profession to better prepare future leaders. Dr. Knapp echoed the prior call for a more standardized curriculum to make educational qualifications more seamless between various settings in the long-term care arena. He emphasized the current NAB curriculum and its “core of knowledge” to achieve greater versatility across the continuum of care. He also discussed the need to consider new models of assessing competency and referred to the certification and fellow program of ACHCA as a possible venue for advancing change. Dr. Knapp concluded by challenging the group to work to change the nature and scope of licensure, and to define the profession appropriately, rather than being defined by “what we aren’t.”

**Dr. Nicholas Castle, Ph.D.**, faculty at the University of Pittsburgh, began by highlighting the existing empirical research on nursing home administrators. He emphasized that administrator leadership affects quality measures (e.g., staff turnover, education of staff, job satisfaction), and also noted that administrator certification by ACHCA leads to increased quality of care in nursing homes. Dr. Castle discussed the research demonstrating that higher initial education and field experience for administrators leads to higher quality outcomes for residents in nursing homes with such administrators in place directing the organization. Leadership, according to Dr. Castle, also means a better 5-star score. He called for the creation of a registry of long-term care administrators to provide an effective data source for tracking tenure of administrators and who is entering or leaving the profession. Dr. Castle also recommended that Medicare or Medicaid funding be allocated to reimburse those nursing homes that have an AIT program.

**Kevin Heffner**, Director of External relations at the Erickson School (University of Maryland – Baltimore County), broached the notion of “desire lines,” where he advocated for analysis to determine where individuals may want to go, rather than where they have been directed to go. He suggested that current long-term care administrators have started forming their “desire lines” already, and to observe what current trends are to assist future administrators. Mr. Heffner also mentioned the challenge of finding appropriate jobs for upcoming graduates in the interim time before the major shift in demand when baby boomers will need even more long-term care supports and services. He suggested curricula be developed to educate students on the various aspects of the long-term care continuum (e.g., assisted living, continuing care communities, nursing homes) and that effective partnerships with state licensure boards be pursued to assist new graduates in securing employment opportunities.

Representing NAB accredited programs and the Health Care Administration Program at the University of Wisconsin – Eau Claire, **Dr. Jennifer Johs-Artisensi, Ph.D.**, articulated the need to



strengthen the current administrator programs in existence and grow the number of programs, too. She discussed methods to attract students to the profession and to use the current administrators, especially those attending the NELS conference, as ambassadors to inspire passion in potential students. Dr. Johs-Artisensi also emphasized issues faced by some academic programs in placing a student in a practicum to gain real-world experience in a quality AIT program. She also noted that a recent study found that more successful AIT experiences have been in locations that provide multiple settings of care which, in turn, exposing the student to a more diverse perspective on the continuum of long-term care.

**Dr. Robert Burke, Ph.D.**, from the Health Services Management and Leadership Program at The George Washington University, discussed partnerships with multiple settings along the continuum of care. He highlighted the nursing home model and its evolution during the past fifteen years, while also suggesting creative hiring and integration practices with those individuals currently in search of gainful employment. Dr. Burke also emphasized the need to work with alumni of academic programs to determine how best to evolve programs to meet the continually changing needs of long-term care. He discussed the need to build positive working relationships, where individuals sit down and understand various perspectives to break down barriers and eliminate unnecessary suspicion.

**Steve Nash**, President and CEO, Stoddard Baptist Nursing Home, representing LeadingAge shared his testimony in abstentia, which focused on an overview of the Leadership Academy sponsored by LeadingAge. Mr. Nash's remarks were centered on three key areas. First, as a profession we need a targeted, nurturing approach for emerging leaders. Second, it is important that we start taking seriously the importance of making sure that we reaching a variety of populations. Lastly, it would help us to start collecting the best practices of innovative, new internal organization approaches for developing emerging HC administrators

**Dr. Douglas Olson**, from the University of Wisconsin – Eau Claire, concluded the expert panel's discussion by first fielding questions from the NELS participants. Questions were raised and discussed by the panel in a number of areas:

- outreach by universities to build quality preceptor relationships;
- working with recent graduates to assist them in gaining experience, including after a successful AIT program completion;
- development and retention of a strong team within a care facility;
- reducing the amount of attrition in long-term care administrators; and
- recruitment of future administrators and retention of those individuals after entering the profession.

In conclusion, Dr. Olson summarized the panel's main points, which were:

- the importance of strategic and ongoing partnerships;
- ensuring the proper stakeholders are at the table, and continually re-evaluating who needs to be brought into the conversation;
- the need to think across the continuum of long-term care supports and services for educational programs and field experiences, and capable, willing preceptors;



- the need to have better data to track the long-term care administrator profession;
- the need for continuing research on long-term care administrators (e.g., minimum educational requirements, versatility of licensure, spectrum of care covered);
- how the profession could best go about defining itself, rather than allowing other outside forces to create or drive the definition; and
- the need to create thoughtful and intentional career pathways that aspire to meet the various option or “desire lines” of those individuals entering the long-term care administrator profession.

Members on the expert panel, along with participants attending the NELS conference, committed to work in the months ahead to achieve progress on each recommendation highlighted during the policy forum and to work in their respective states to achieve progress in the recommended policy initiatives. Dr. Olson thanked panelists for their excellent remarks and also thanked the supportive organizations and individuals who helped make the policy forum a success, including ACHCA, NAB, the Wertlieb Family Foundation, and Golden Living.

**Michael Muetzel, MBA**, Mx Marketing, Management Solutions, opened the afternoon session with a lively discussion on how generational values differ. He explored how these differences impact organizations and the critical relationship between the staffs’ work environment and metrics for success. Mr. Muetzel also provided tips for integrating generational values and expectations into the workplace without spending a lot of money, and methods for employee orientation, communication, and coaching that will help build trust and engagement. To get the participants brainstorming about initiatives this cohort of NELS participants would pursue, Mr. Muetzel had attendees identify priorities that they could focus on, given considerations of time and resources for each person involved, and also conducted a group exercise to help participants identify the strengths and challenges of NELS participants. Each group of participants developed between four and five recommendations of what the 2013 NELS work should encompass, with a substantial amount of commonality existing between groups.

Following a busy schedule at the U.S. Senate and in work with Mr. Muetzel, NELS participants attended a baseball game at the Washington Nationals stadium. NELS participants, student and staff members, and steering committee members were treated to an excellent game against the Arizona Diamondbacks, with the Nationals pulling out a 3-2 win in the 9th inning.

On the last day of the Summit, participants attended a panel session to provide updates on the work conducted to date on the 2012 NELS recommendations by partnering organizations. Panelists included **Marianna Kern Grachek, MSN, CNHA, CALA, FACHCA**, President and Chief Executive Officer, American College of Health Care Administrators (ACHCA); **Randy Lindner, MHSA, CAE**, President and Chief Executive Officer, National Association of Long-Term Care Administrator Boards (NAB) and The NAB Foundation; **David Gifford, M.D., MPH**, Senior Vice President of Quality and Regulatory Affairs, American Health Care Association and the National Center for Assisted Living (AHCA/NCAL); and **Michael Rambarose, MBA**, President and Chief Executive Officer of Whitney Center, Inc., representing LeadingAge. The panel highlighted the importance of joining national organizations to work toward an improved public image of the



LTC administrator profession, and the work accomplished to date on standardization of the administrator license across state boundaries, including work toward establishing reciprocity agreements in the interim. Several panelists also highlighted the importance of mentoring for emerging leaders in the LTC field, in addition to standardization of educational and AIT experiences for young professionals entering the field, and highlighted their respective programs which help younger professionals accomplish this.

Following the panel session, NELS participants were able to spend time with each panelist in small groups to discuss the changing landscape of the LTC field and to have in-depth conversations about the broader topics discussed during the panel presentation. Each panelist highlighted important facets of the 2012 NELS recommendations to inform the work of the current attendees, including mentoring opportunities (both for attendees and mentoring attendees could assist with for future generations), work on standardization of licensure across state boundaries, collaboration with professional organizations, and efforts to improve the public persona of the LTC administrator profession.

To conclude the Summit, using the foundational work completed by the 2013 participants from the prior two days, **Mr. Muetzel** and **Dr. Olson** facilitated an intense group exercise to develop comprehensive action plans that included enhanced accountability of NELS participants' work toward attaining each committee's goals, promoting the NELS program to attract future emerging leaders, strengthening the partnerships with key professional associations, serving as mentors for future LTC leaders and administrators currently receiving their collegiate education, increasing mentoring to improve the public perception of the LTC field, and writing a white paper and legislative summary. These plans helped organize the group and established timelines for each committee to report progress made at various steps along the way to implementation of goals and actions necessary to achieve the set goals. The participants concluded the NELS by each personally expressing how inspired they were by the Summit. Many of the participants committed to becoming more involved in associations, to not underestimate the power of collaboration, and to work toward improving the public image of LTC. This energy created the platform from which the work continues.



## List of Appendices

- Appendix A:       Event Program**
- Appendix B:       2013 Pre-NELS Survey Results**
- Appendix C:       2013 Action Plans**
- Appendix D:       Summit Presentations**
- Appendix E:       Senate Policy Forum Legislative Summary**
- Appendix F:       2013 NELS Participants**

All appendices can be found on the NELS website: <http://www.gwumc.edu/lcsummit> .



## References

<sup>1</sup> Table 2. Projections of the Population by Selected Age Groups and Sex for the United States: 2010 to 2050. Population Division, U.S. Census Bureau. August 14, 2008.

<sup>2</sup> National Health Expenditure Projections 2009-2019. Center for Medicare and Medicaid Services. <https://www.cms.gov/NationalHealthExpendData/downloads/proj2009.pdf>. Accessed 10-07-11.

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<sup>4</sup> DIRECTORATE FOR EMPLOYMENT, LABOUR AND SOCIAL AFFAIRS Employment, Labour and Social Affairs Committee; Health Committee. Organization for Economic Cooperation and Development. <http://www.oecd.org/officialdocuments/displaydocumentpdf?cote=delsa/elsa/wp2/hea%282009%291&doclanguage=en>. Accessed 10-07-11.

<sup>5</sup> National Association of Boards of Examiners of Long Term Care Administrators (2000). Decline in license exam applicant study. Washington DC. NAB.

<sup>6</sup> National Emerging Leadership Summit Legislative Policy Forum. "Advancing Practices for Raising the Bar for the Senior Care Leaders." United States Senate Special Committee on Aging. 2012. (For testimony of expert panel during the policy forum, please see Appendix E.)

<sup>7</sup> 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](http://www.achca.org)).

<sup>8</sup> Supplemental Research Brief: 2009 National Business Ethics Survey, Millenials, Gen X, and Baby Boomers: Who's Working at Your Company and What Do They Think About Ethics? Ethics Resource Center. 2010.