THE NEXT GENERATION OF LONG TERM CARE LEADERS

Professionals Leading Passionate Innovation
2012 National Emerging Leadership Summit for Long-Term Care Administrators | June 12-14, 2012

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ACKNOWLEDGEMENTS

Remembering Dr. Paul Willging

Former American Health Care Association/National Center for Assisted Living (AHCA/NCAL) leader Paul Willging passed away on May 25th, 2011, after a battle with cancer.

Those of us who were fortunate enough to work alongside Dr. Willging quickly learned of the depth of his commitment to long-term care and to those people who dedicate their lives to providing such care. He was an unmatched teacher and always nurtured those who had a passion for the profession.

Through his work at AHCA, Dr. Willging pushed initiatives that helped make great strides in improving quality in America's nursing homes. He was a true visionary in this area. Dr. Willging's professional legacy lives on in the accomplishments of the many people he taught and the minds he shaped in his lifetime.

AHCA and NCAL will honor his legacy by supporting the education of the next generation of long-term care professionals. Donations received in memory of Dr. Willging will be used to set up a scholarship for the 2012 National Emerging Leadership Summit.

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Thank you to our co-sponsors:

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The Wertlieb Family
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 Third Annual National Emerging Leadership Summit, and the inaugural Summit in 2010 along with the 2011 Summit served as the basis upon which the participants in the 2012 Summit developed their continuing and intentional agenda.

The 2012 participants also made further strides to advance both the 2010 and 2011 Summit recommendations and continue progress on the action taken by previous summit participants. The purpose of this White Paper includes:

- Establish a platform for the 2012 participants and partners to advance actions;
- Setting a foundation for planning the 2013 Summit;
- Serving as an additional resource for this next cohort; and
- Providing evidence and support for the professional field of health and aging services administration to advance positive changes.
EXECUTIVE SUMMARY

The 2012 National Emerging Leadership Summit (NELS) brought together emerging leaders in the field of health and aging services administration from across the country. This third gathering of professionals reviewed the foundational work of the 2010 NELS participants, along with the work and continued progress of the 2011 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 2012 Summit. Included in this paper are calls to action, attendee perspectives, session summaries, and participants in the 2012 NELS Summit.

During the Summit, the five thematic areas identified by the prior 2011 NELS participants and the perspective of the current 2012 participants framed the initial Summit discussions. This paper will discuss each of the 2012 NELS recommendations, providing a definition and detailed action plan for each, from which future activities and agendas can be developed. The recommendations from the 2012 NELS participants included the following:

1. Increasing accountability of NELS participants and promoting the NELS program;
2. Developing partnering relationships with related associations and organizations;
3. Pursuing mentoring opportunities for future leaders of the long-term care field;
4. Enhancing community outreach opportunities; and
5. Publishing the 2012 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 the work already performed by the 2010 and 2011 NELS participants. 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 continue making progress transforming the long-term care administration profession.

The steering committee and 2012 NELS participants reviewed this paper prior to this broader dissemination. The information noted in this document is a reflection of the voice of the 2012 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 2013 NELS Summit. The 2012 NELS participants adopted the previously-developed descriptor of their identity, “professionals leading passionate innovation,” and each of the 2010, 2011, and 2012 NELS participants are the epitome of this new brand for this noble profession.
BACKGROUND

With unprecedented growth rates for the senior citizen 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 (age 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.\(^1\) As Americans continue to 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.\(^2\) 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.\(^3\) 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\(^4,\) 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].”\(^4\)

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, assisted living settings, continuing care retirement communities, home care, hospice, and daycare services. Each of these settings targets the senior 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.

\(^{a}\) 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.\(^5\) 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.\(^6\) 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.\(^7\)

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 modest 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 to attract the best talent.

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 Millenials, further demands a better work life balance and attempts to do this by integrating more technology into the work place.\(^8\) 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. 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 administrative professionals. These professionals are eager to transform the LTC administration profession. These individuals 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 quality of care and service 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:

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

The 2012 NELS agenda placed an emphasis on developing strategic action plans to address recommendation made from the prior NELS participants and to begin addressing the current challenges. Combined with developing action plans, the 2012 participants identified that NELS as a venue to facilitate change needed a goal and vision to help establish its premise and focus. The 2012 participants embraced the goal and vision developed by the 2011 NELS participants of “professionals leading passionate innovation,” while moving forward with recommendations to continue the success of the NELS program.
PURPOSE OF SUMMIT

The 2012 NELS participants’ perspectives, surveyed prior to the commencement of the Summit, served as an initial 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 also had the opportunity to attend a legislative forum jointly sponsored by NELS and the Senate Special Committee on Aging, and meet personally with professional and trade organization representatives 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 efficient low-cost, LTC services.

The 2012 participants received information from a 2011 NELS representative to learn how and why the 2011 recommendations were identified and how those recommendations evolved from the 2010 NELS Summit. 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, 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. While the average age of the 2012 participants was 33 years old, the age range spanned from 24 to 41 years old. Their greatest percentage of participants’ tenure in their long-term care (LTC) service setting was 11-15 years, which was followed closely by those in their LTC service setting for 3-5 years. With regard to education, all participants of the 2012 NELS summit had a four-year bachelor’s degree, and many also had pursued further education (e.g., Master’s level degree). A few key reasons these individuals enjoy their jobs include the variety of tasks required for their job, the importance of resident and family interaction, and the daily interaction with co-workers that makes their position interesting and meaningful. On the other hand, the regulatory environment, maintaining a strong financial position, and the public’s negative impression of LTC challenge the participants to feel satisfied with their positions, which were identical to the 2011 NELS participants’ self-reported challenges. Other 2012 NELS participant perspectives included the following:

- From the vantage point of the 2012 participants, the next generation of LTC leaders has a negative view of the LTC field, which is consistent with overall public perception.
- Approximately 95% of NELS participants reported that they belonged to a professional or trade association or professional licensing agency, including the American College of Health Care Administrators (ACHCA), LeadingAge, the American Health Care Association (AHCA) or the National Board of Examiners for LTC Administrators (NAB).
- Early job experiences, a family experience, and/or an educational track served as the three most common ways these professionals entered the LTC administrative field.
- A proper work/life balance, working in an open and respectful work environment, and having opportunities to learn and grow, in that order, were all important aspects of a work culture to the participants.
- Mentoring played a significant role in career choice and success, with 82% of participants reporting they had one or more mentors in the LTC field.
- Participants’ job satisfaction was at a very high level, and interests were strongly orientated toward developing their LTC careers within present employment settings especially within the next five years.
By understanding the background and perspectives of the 2012 NELS participants, the steering committee ensured that 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 dynamics of the legislative process.

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, opened the Summit by focusing on the importance of the LTC field and highlighting the current state of the LTC field, including challenges to address. Dr. Olson also highlighted the importance of leadership practices designed to transform the LTC administrator field. He also 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 2012 participants saw as viable, and to really take ownership of the next steps of the NELS work. 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.

Following Dr. Olson’s welcoming presentation, Josef J. Reum, Ph.D., MPA, Senior Associate Dean and Professor, Departments of Health Policy and Health Services Management and Leadership, welcomed the participants and echoed many of Dr. Olson’s comments to seize the opportunity to identify and develop constructive plans to address the many challenges facing current and future administrators. Dr. Reum spoke of the legislative challenges facing changes to improve laws and regulations affecting the LTC administrator profession and the monetary expenditures to prevent or influence change.

Dr. Olson and Jennifer Hagen, Administrator of Marquis Care at Powellhurst and a 2011 NELS participant, also discussed the pre-Summit survey results and highlighted the rationale behind the 2011 NELS cohort recommendations. Dr. Olson highlighted key characteristics describing the multigenerational work, and facilitated a discussion with 2012 participants that continued over the three days of the NELS Summit. As the facilitator, Dr. Olson urged the 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 2012 NELS participants reviewed and elaborated on the 2011 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 2011 NELS recommendations that the 2012 participants used as a framework.

**2011 Recommendation #1: Develop Standardized State Licensure and Reciprocity Agreements**
This recommendation focuses on developing strategic plans to collaborate with NELS sponsors, especially the National Association of Long-Term Care Administrator Boards (NAB), to explore and take any steps necessary to standardize the long-term care administrator license across all state borders. This includes reviewing information and developing strategies to pursue changes in legislative policies on both the Federal and state levels.

**2011 Recommendation #2: Support the Effort to Standardize the LTC Vocabulary**
Participants from the 2011 NELS Summit identified this area of improvement as a mechanism to facilitate standard nomenclature to better help the public understand the LTC field and the services it provides to residents and families. This recommendation includes the identification and defining of key terms necessary for the LTC field, particularly those for LTC services and professional roles within the field, and a plan for national dissemination of identified and adopted terminology.

**2011 Recommendation #3: Identify and Support Developing Mentor Opportunities**
The focus of this recommendation stems from the importance of mentoring, which bonds professionals and provides encouragement and support during difficult professional situations. This recommendation also evolved from one of the 2010 NELS recommendations, and has also been a focus of the ACHCA. Participants worked to determine ways to partner with ACHCA and serve as mentors to new administrators.

**2011 Recommendation #4: Develop a Marketing Plan to Begin Promoting the NELS Summit as a Professional Event for “Professionals Leading Passionate Innovation”**
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.

These recommendations established the framework from which the 2012 NELS participants started to develop formal action plans to help advance the profession and the work of future NELS gatherings. Each action plan from the 2012 NELS Summit addresses some aspects of the 2011 NELS recommendations and establishes both a strategic plan and key partnerships. (Please see Appendix C for detailed action plans.) The following summarizes each action area:

**2012 Action Area #1: Participant Accountability and NELS Promotion**

**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 2012 NELS objectives and how to best facilitate and encourage NELS 2012 communication within and between the various committees. In addition to accountability, the committee worked to develop various outlets in which to promote the NELS Summit among current members and within the LTC field.

**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 established LTC administrator programs within universities.

**ACTION PLAN:** To achieve the goal of monitoring progress on 2012 initiatives, the committee established representatives to contact regularly with members of the other committees to ascertain progress. The committee also made plans to obtain action plans from each of the groups to monitor work performed and also to use in publicizing the work of NELS participants. Participants on the committee also discussed developing a list of promotional ideas, both within NELS and outside the past and current participants, for promoting the work completed thus far. Lastly, the committee pledged to work on organizing a webinar to check on committees’ progress in December 2012.

**2012 Action Area #2: Partnering with Associations and Organizations**

**BACKGROUND:** The success of the work outlined and pursued by the NELS participants hinges upon the available organizations with which participants are engaged with can partner and work toward improving the LTC administrator profession, a goal that benefits all involved. The committee felt that the message of the NELS Summit and from its participants would have more weight if presented to partnering associations
and organizations to utilize the ideas developed during NELS Summits in attempts to revitalize the profession.

**PARTNERS:** The committee identified the need to reach out to prior NELS participants to ascertain which professional organizations those participants belonged to, and then also identify which organizations and associations current NELS participants are engaged with and can work with. The committee noted the importance of working with ACHCA, NAB, AHCA, and LeadingAge, to disseminate the NELS message and work for future endeavors by those organizations.

**ACTION PLAN:** The committee designed a timeline in which they would research the involvement of NELS participants, current and former, in professional organizations and associations. Committee members also strategized about becoming involved in state associations, both local chapter meetings and statewide annual meetings, and attending several statewide meetings to deliver the NELS message to the respective groups. In addition, the committee scheduled conference calls to analyze the research of organizations that NELS participants belong to, and also strategized about a six-month follow-up survey for prior participants to determine which organizations had a NELS participant at any of their local or statewide meetings. They also wanted to find out if NELS activities had accelerated the involvement with these organizations.

**2012 Action Area #3: Pursuing Mentoring Opportunities Future Leaders in Long-Term Care**

**BACKGROUND:** In an effort to improve the public persona of the LTC administrator profession, this committee felt the need to reach out to undergraduate students considering a career in the LTC field, people who would be ideal candidates to enter the field or administrators early in their careers. While the purpose and outcomes of the NELS were seen as very beneficial to those in the field, the committee also felt the need to serve as mentors in an attempt to bolster future generations and their perception of the profession.

**PARTNERS:** While the committee felt the need to perhaps reach out to non-NAB accredited academic programs to reach future LTC administrator leaders, members on the committee felt working with NAB accredited Universities would also be beneficial to learn best practices and outreach initiatives already underway. In addition, to introduce students to exemplar LTC administrators, who have been in that role for a period of time, additional partnering with ACHCA, AHCA, and LeadingAge was seen as paramount to aid in the outreach to younger generations. 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 research existing programs from corporations who hire LTC administrators and the various requirements for both
mentoring and administrator-in-training (AIT) programs at the universities with such programs. The group identified as their audience for outreach those in undergraduate degree programs, especially those students who were close to graduation in a health or aging services program, or recent graduates. The committee felt that finding out more about the recent ACHCA mentoring program would be beneficial, as well. The committee members also saw the need to coordinate activities within the NELS committees, and strategized about how best to work with the Outreach Committee (see Action Area #4) to increase efficiency in NELS promotion.

2012 Action Area #4: Community Outreach Opportunities

BACKGROUND: Participants in this committee identified the value of promoting the work begun and advanced by the NELS participants as one way to work on improving the public persona of the LTC administrator profession. The committee felt the publicizing of NELS initiatives and progress on recommendations would both help encourage other emerging leaders in the field to attend future NELS Summits and also to change the public view of the profession and work toward reducing the negative stigma associated with long-term care settings and those who work there.

PARTNERS: The committee identified the need to partner with local high schools and colleges near where members of the committee live and work. This included Concordia University, the University of Portland, and Pacific University in Oregon; the University of Wisconsin – Eau Claire in Wisconsin, the George Washington University in the D.C. metro area, and the Kansas Adult Care Executives (KACE) in Kansas, as good places to pursue initial pilot efforts to build on and breed success.

ACTION PLAN: The committee strategized about developing a PowerPoint presentation that NELS participants, both former and current, could use in speaking with other organizations and at educational institutions about the field of long-term care, the NELS mission, work Summit participants were doing in their respective communities, and recommendations from participants attending the Summit. Working with the educational institutions near to the members of this committee as a beginning point, the committee hoped to refine the message of improvements and innovations in the LTC field and enable other NELS participants to develop outreach opportunities in their local communities.

2012 Action Area #5: Publish the 2012 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 and 2011 achievements, the steering committee published a white paper that served as a foundation for subsequent NELS summits.

**PURPOSE:** The participants and steering committee concurred that capturing the 2012 NELS activities and strategic action plans is necessary. This white paper serves 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.

**ACTION PLAN:** NELS Summit organizer, graduate student, and undergraduate student members will create an initial draft of the white paper to submit to the steering committee and 2012 NELS participants. Upon collective review and agreement, the paper will be published in the fall of 2012 through professional associations’ respective websites and publications. The findings from the 2010, 2011, and 2012 NELS pre-surveys and recommendations will establish the foundation for a research article as well.

The development of committees to support the identified action initiatives and the commitment to action plans demonstrates the readiness of these 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 the recommendations defined during the 2010 and 2011 NELS including:

- Addressing the negative stigma associated with LTC by becoming more engaged 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, as well as a committee dedicated to accountability, which would collaborate with steering committee members to develop and meet key milestones for each strategic area. An effort will be made to invite both 2010 and 2011 NELS participants to contribute and support achieving the next phase of this work. Each of the 2010, 2011, and 2012 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 three years of its existence, the overall findings from the 2012 NELS included:

1. Publicizing and educating various professionals and organizations on the NELS goal and vision;
2. Concisely describe the work being done by the Summit;
3. Establishing a greater involvement with professional associations to achieve the important initiatives outlined by the 2012 NELS committees;
4. Pursuing a multifaceted approach to reducing or eliminating the negative public stigma of the LTC administrator profession; 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 2012 NELS participants’ intent to actively address the recommendations defined during the 2010 Summit and advanced during the 2011 NELS Summit, emphasizing the need for accountability and partnership to succeed in achieving the important goals outlined by participants.

Each of the 2012 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.

Both the 2010 and 2011 NELS participants dedicated time, energy, and passion to revitalizing the LTC administrator profession and the 2012 participants both acknowledged and adopted their 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 three 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. Understanding the value of the Summit and demonstrating successful progress in each strategic area will formally mark the onset of transformation within the LTC administration.

Thank you for taking the time to read and review this third 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.

Any correspondence regarding this white paper, its recommendations, appendices, or the 2012 NELS Summit, should be sent directly to:
Dr. Douglas Olson, University of Wisconsin – Eau Claire (olsonDou@uwec.edu).
For further information on the 2012 NELS Summit, please visit:
http://www.gwumc.edu/ltcsummit.
SUMMIT PROCEEDINGS

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 to the 2012 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. To familiarize the 2012 participants with one another and to start discussing the focus and purpose of the Summit, Dr. Olson had the attendees introduce themselves and discuss what the NELS mission meant to them.

Following Dr. Olson’s welcoming presentation, Josef J. Reum, Ph.D., MPA, Senior Associate Dean and Professor, Departments of Health Policy and Health Services Management and Leadership, 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. Reum spoke of the legislative challenges facing changes to improve laws and regulations affecting the LTC administrator profession and the monetary expenditures to prevent or influence change. He emphasized the crucial need for LTC and its continuous improvement, thus the importance of the NELS. In order to change the field of long term care, Dr. Reum reminded the participants of the value in influencing policy makers, making Washington D.C. the perfect place for the NELS.

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 NELS Summit: have a clear vision, desire change, be open to communication, maintain a visible presence, and uphold a set of values.

Jennifer Hagen, Administrator of Marquis Care at Powellhurst, and Dr. Olson provided an overview of the 2011 NELS Summit and the participants’ recommendations. They described the key takeaways and five thematic areas that the 2011 participants thought were most essential. Together, Ms. Hagen 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 2012 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 high schools and colleges and professional organizations, marketing, and increasing participants’ personal amount of 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 third 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 2011 cohort of NELS participants, primarily the recommendation made by that group of participants which addressed standardized state licensure requirements and reciprocity agreements for LTC administrators. Following the welcomes by Robert Burke, Ph.D., Chair, GW Department of Health Services Management and Leadership and Gordon A. Friesen Professor of Health Care Administration; Anne Montgomery, Senior Policy Advisor, U.S. Senate Special Committee on Aging; and Chad Metzler, U.S. Senate Special Committee on Aging on behalf of Senator Herb Kohl (D-WI), the Chairman of the Special Committee on Aging, the panel weighed in on the issues facing the field of health and aging services administration.

Steven Chies, representing the American Health Care Organization, began testimony with a historical background of attempts to assemble a national database of administrators in the United States, only to be hampered by the variation in state licensure requirements. Mr. Chies mentioned also using only one state’s database and encountering issues with that attempt. While mentioning inefficiencies in the regulatory model, he noted that further research is being conducted to determine what the necessary qualifications and educational requirements should be for a long-term care administrator. He further supported efforts to look beyond merely education, and uncover what other skills and traits make a highly effective and highly successful administrator.

Mary Jane Koren, M.D., M.P.H., from the Commonwealth Fund, began her testimony with the assertion that “quality comes down to leadership.” Dr. Koren highlighted the three vehicles which she felt would help transform the next generation of long-term care leaders: training, administrator-in-training (AIT) programs, and licensure tests. Dr. Koren discussed the work the Fund had been doing to develop new tools for administrators, and emphasized the importance of giving those tools to leaders who could successfully utilize their benefit to successfully implement culture change and person-centered care. Lastly, in addition to requesting Federal government assistance to craft standardized definitions across state boundaries, she discussed the importance of developing effective AIT programs to ensure future leaders have a firm foundation upon which to start a long-term administration career.

Representing the American College of Health Care Administrators, Marianna Kern Grachek, MSN, CNHA, CALA, FACHCA, echoed Dr. Koren’s statement that leadership matters. Ms.
Grachek also emphasized the importance of responding to changing demands the field experiences on a daily basis, including attracting and retaining qualified, competent staff, a process that can take substantial amounts of time and attention. Ms. Grachek discussed the variability in administrator education and training experiences among the states, as well as the lack of portability in an administrator’s license, as two major barriers facing professionals in the long-term care administration field. She emphasized the importance of standardization of entry-to-practice and continuing practice requirements to increase the trust among states and enhance the prestige of the profession.

Randy Lindner, MHSA, CAE, representing the National Association of Long-Term Care Administrator Boards, began by discussing the image problem facing the long-term care administrator profession and the difficulty faced in recruiting talented individuals into the field, including the variation in educational programs and non-funded AIT programs. In addition, Mr. Lindner highlighted the variation in licensure requirements not only for nursing homes, but also in those states that have or are in the process of creating licensure requirements for other forms of long-term care (e.g., assisted living campuses). He discussed a practice analysis and accompanying research his organization would be undertaking to ascertain the core competencies across the continuum of long-term care services, which would lead toward the development of a “super credential,” to help transcend state boundaries and state variations, and would also allow for standardization in educational programs.

Wendy Green, of LeadingAge, lauded the panel’s recommendation to create leadership development opportunities for emerging leaders in the long-term care administration field. Representatives from her organization, when polled, said that the void of emerging, next-generation leaders caused them distress when considering the longevity of the field. Ms. Green highlighted the Leadership Academy developed by LeadingAge, which helps individuals in this field to move the field forward, to embrace uncertainty, and see opportunity in challenge, which ultimately benefits residents and clients served each day. She encouraged members of the field to seek out such a program to enhance leadership skills and to advance the field for the next generation.

Nicholas Castle, M.H.A., Ph.D., professor at the University of Pittsburgh, highlighted the research he and other scholars have conducted within the field of long-term care administration. Discussing the amount of data analyzed over the years, Dr. Castle explained the significant relationship of nursing home administration on important issues such as staff turnover, quality of care, satisfaction, safety, and quality of life for residents. He also elaborated on administrator qualifications that improve the care delivered to residents, and emphasized the importance of level and quality of education and effective AIT programs to improve quality of care and quality of life.

Alice Bonner, Ph.D., RN, FAANP, from the Centers for Medicare and Medicaid Services (CMS), explained in detail that the regulation creation and change processes are very involved, and rely heavily upon the experience of administrators in the field. Dr. Bonner encouraged the panel, as well as prior and current NELS participants, to bring their ideas to CMS during regulation
creation and modification, and to work with CMS to develop policy utilizing real-world experiences and roadblocks to craft savvy regulations.

From the National Consumer Voice for Quality Long-Term Care, Robyn Grant spoke about the consumer perspective regarding quality long-term care administrators. As part of AIT programs, Ms. Grant relayed commentary from her members about the importance to them of spending time in various staff positions within a facility as well as spending time receiving care as a resident would. Ms. Grant also emphasized qualities residents and their family members value in an administrator, such as attentive listening and the willingness to address challenges within a community, along with maintaining a presence throughout the community and pitching in to help to model teamwork and appropriate behavior expected from all staff.

As the concluding speaker, 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, emphasized and echoed comments from other panel members regarding the importance of standardizing requirements for administrator licensure and developing continuity in educational programs across the country. Dr. Olson highlighted the various aspects of the administrator program at his school, including the educational requirements and the wide scope of experience students get in the AIT program. One of the best practices he commented on was that their students receive a stipend for their field experience, rather than asking them to be engaged without pay. He also highlighted research conducted into the quality and depth of AIT programs and the requisite qualifications for preceptors of AIT programs. Dr. Olson concluded by summarizing the panel’s recommendations, which are:

- the standardization of licensure, to allow the field to focus on better approaches and models of training, and allow for greater portability of licensure;
- that, based on preliminary and strong evidence, the optimal and appropriate level of education and field experience for an administrator can be determined;
- a valuable field experience allows the student in an AIT program to focus their attention on professional growth and development needed to engage in the profession, and that the student be funded during their field experience; and
- raising the image of a health and aging services administrator is an important issue to address, requiring the recruitment of a variety of stakeholders to assist in this endeavor.

The above recommendations reflect the general consensus and support of the entire panelist group representing a wide variety of key stakeholder organizations involved in the delivery and improvement of senior care in this country.

The panel concluded the policy forum by fielding questions from NELS participants and the audience to ascertain insights and concerns from the emerging leaders in the long-term care administration field. Several ideas to address and implement the expert panel’s recommendations were discussed, and all members of the panel committed to work in the days ahead to achieve progress on each recommendation highlighted during the policy forum.
Michael Muetzel, 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. He 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. Each group developed between four and five recommendations of what the 2012 NELS work should encompass, and there was a substantial amount of commonality between groups.

Following a networking dinner, a panel on workforce challenges including Daniel Schwartz, Chief Operating Officer, Addus Healthcare; Cynthia Thorland, Vice President, Educational Resources, Life Care Services; Pamela Hansen, Vice President, Human Resources, Golden Living; and Robert Burke, Ph.D., Chair, GW Department of Health Services Management and Leadership and Gordon A. Friesen Professor of Health Care Administration, who was the facilitator, addressed how leaders in the LTC administrator field prepare for the changes and challenges in future workforce compositions. The panelists highlighted good communication skills, an ability to inspire and build trust, and being able to recognize one’s strengths and weaknesses. The panelists addressed the challenges of retaining strong staff members, including educational and professional development opportunities, which led to a lively discussion about giving staff the right tools to be successful. Panelists also discussed how current NELS attendees could relay the value of the NELS Summit to their parent corporations to encourage decision-makers to send other emerging leaders for future Summits. In addition, the panel discussed individualized professional development plans, mentoring, and creating opportunities for attendees’ professional growth.

On the last day of the Summit, participants attended a panel session to provide updates on the work conducted to date on the 2011 NELS recommendations by partnering organizations. Panelists included Governor Mark Parkinson, President and Chief Executive Officer, American Health Care Association (AHCA) and the National Center for Assisted Living (NCAL); Marianna Kern Grachek, MSN, CNHA, CALA, FACHCA, President and Chief Executive Officer, American College of Health Care Administrators (ACHCA); Barbara D’Agostino, Chair of LeadingAge D.C. Chapter, Health Services Administrator at ADF/Knollwood; and Randy Lindner, MHSA, CAE, President and Chief Executive Officer, National Association of Long-Term Care Administrator Boards (NAB) and The NAB Foundation. 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.
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 2011 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 2012 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. 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: 2012 Pre-NELS Survey Results
Appendix C: 2012 Action Plans
Appendix D: Summit Presentations
Appendix E: Senate Policy Forum Testimony
Appendix F: 2012 NELS Participants

All appendices can be found on the NELS website: http://www.gwumc.edu/ltcsummit.
References

3 Ibid.
6 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.)