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**Signature  
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Initiative**

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# Community Connection

University Collaboration at Clark-Lindsey

VP for Philanthropy and Social Responsibility at Frasier

# University Collaboration at Clark-Lindsey

Located in Urbana, IL, Clark-Lindsey is nestled among 10 universities and colleges within a 50-mile radius, including University of Illinois at Urbana Champaign, Eastern Illinois University, and Lake Land College. Due to its proximity, it's no surprise that 42% of Clark-Lindsey residents are alumni of University of Illinois at Urbana-Champaign (UIUC) and 85% of residents have attended a UIUC event. In 2011, the Life Plan Community decided to further strengthen those relationships by integrating student interns and volunteers into the Clark-Lindsey team.

Clark-Lindsey's University Collaboration Program began with cold calls, cold emails, and university meet-and-greets. A Clark-Lindsey staff member reached out to deans, professors, coordinators, and advisors, scheduling meetings three-to-five times a week to learn about the focus of university staff, and share more about Clark-Lindsey.

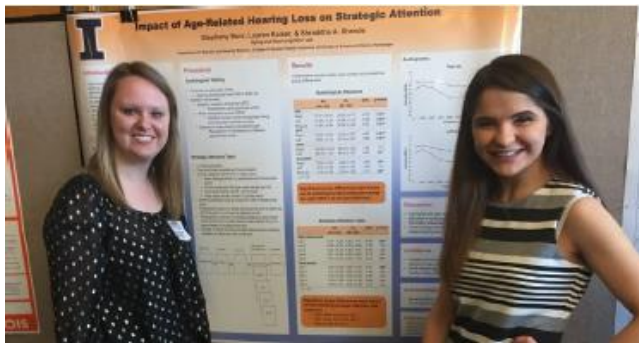
The internship program requires 10 hours a week and averages 12 interns per semester. While each professor involved in overseeing interns has different curriculum objectives, a final presentation and a poster is required from each intern showcasing what they learned during their experience at Clark-Lindsey. Projects vary based on the interns' interests and majors. Professors, advisors, students, and interns are invited to attend the final presentations.

Clark-Lindsey requires that interns receive academic credit for their time, and if that is not possible, will hire the interns as part-time employees. Beginning January 2019, CNAs seeking patient contact hours receive both academic credit and pay for their hours.

Student interns originate from local high schools and colleges across many different majors. On



*Student intern assists resident with an iPad*



*Student interns present final presentation projects*

average, one-third of the interns take advantage of the opportunity because they are interested in a career in a Life Plan Community. The remainder participate because of the program's excellent reputation, with professors and advisors singing its praises. Student interns are encouraged to not just come for work and leave, but to attend clubs, meet community leadership, attend Board meetings, and participate in weekly reflections.

On average, 80-90% of interns leave with a more positive perspective on aging services than they had when they began, based on pre- and post-internship survey results. For many student interns, the University Collaboration Program provides first-time experience working in both aging services and a professional setting.

Since the program's inception, seven student interns have been welcomed to Clark-Lindsey on a full-time basis. Roles have not always transitioned from intern to full time employee, but the prior experience with Clark-Lindsey has provided an easy transition. Some of the roles currently held by former student interns include social worker, resident support specialist, director of strategic initiatives, special projects coordinator (interned as a data analyst), unit secretary, marketing coordinator, and admissions coordinator.

By the numbers:

- 7 student interns have been hired as employees
- 90 students have completed 24,500 hours of internship experience
- 250 students have gained 8,500 hours of volunteer experience
- 200 students have gained 4,000+ hours of clinical shadowing experience
- More than 100 students and faculty have provided 1,000+ hours of performances and presentations

Additionally, Clark-Lindsey offers an "in-residence" program to students attending local universities, providing free room and board in studio guest suite apartments in exchange for internship hours.

Moving forward, Clark-Lindsey is working to deepen the research relationship with UIUC's Collaborations in Healthy Aging Research Program to provide a 1-bedroom apartment home for them to use as a research lab on campus. Current on-site research studies aim to assess older adults' use of technology, including digital home assistant technologies, physical activity technologies, a mobile health application that measures risk of falling, and a new web browser.

# VP for Philanthropy and Social Responsibility at Frasier

Frasier developed the Vice President for Philanthropy and Social Responsibility position, where the VP has the responsibility for developing programs that encourage planned giving, estate planning, and campaigns for the internal benefit of the organization. The philanthropy program is not limited to Frasier's campus alone, but it is focused on the individual's interest in philanthropy anywhere.

"Our philanthropic mission is to create a culture of giving that affords opportunities to benefit the residents of Frasier, our employees and the greater community," says Frasier's website. "As a reflection of our values, our culture of giving impacts all elements of the Frasier community. Frasier charitable funds are used to enrich the lives of our residents and others by funding projects, programs and services."

The intent of the position is to help fulfill residents' altruistic passions wherever they lie, both encouraging gifts to Frasier and giving back to the global community.

Two statements define Frasier's goal as it relates to the global community:

1. Boulder should be a better place because Frasier is here. We seek to impact the aging experience in Boulder. The parameters of our world are not the edges of our campus.
2. Frasier is not the end game, Frasier as the avenue to impact the larger world...is.

Karla Rikansrud, VP for Philanthropy and Social Responsibility, has held the role at Frasier since 2016. Her professional background is in not-for-profit management and she has served on several boards in the Boulder community. "Frasier is pro-philanthropy, whether it happens inside the Frasier community or the global community."



*Frasier residents teaching staff English*



*Residents enjoy a social event supporting the community*

Karla acts as a resource within Frasier for residents and offers a philanthropy welcoming program for new residents. 60-90 days after move-in, Karla meets them in their apartment to serve as a resource. Karla answers any questions they have about Frasier, explains her role, the opportunity it provides residents, and asks the resident a few questions to get to know them.

Before developing the VP for Philanthropy and Social Responsibility role, Frasier offered two annual appeals: memorial and year end. They have expanded the program to include one appeal a quarter, including a spring music program, summer, fall employee education, and a year end.

Residents are interested in giving time and resources to the community, and Karla helps to locate opportunities that appeal to the residents. “We have a strong volunteer relationship within the greater Boulder community,” said Karla. Frasier has a team who participates in the annual Alzheimer’s Association walk, participates in the hospice organization’s annual fundraiser event, and assists the Boulder county community food share, where residents help sort food for the community.



# Health and Wellness

Leadership Care Team at Aldersgate

Montessori Aging and Dementia at Clark Retirement Community

Rock Steady Boxing at Edgewood

Creative Arts at Mather LifeWays

Lend an Ear at Vicar's Landing



# Leadership Care Team at Aldersgate

Aldersgate's Leadership Care Team (LCT) is a program offering 24/7 support to residents in the Emergency Room as needed, excluding some holidays and inclement weather. A staff member carries an on-call cell phone for one possibly two weeks of the year so all 52 weeks are covered. When a member resident goes to the Emergency Room, it is offered that the on-call team member will meet them there and provide companionship until they get admitted, discharged, or at least "settled."



A member of the staff is on call weekdays from 8:30 a.m. to 8:30 a.m. Thursday through Thursday, including weekends. The staff member is expected to conduct a round of Aldersgate once during the weekend and is encouraged to have a meal at the community, so residents will be further aware of the presence of management on campus.

The primary responsibility of the staff member on call is to provide support to residents who are sent to the hospital and whose family members are unable to assist. The on-call staff member is expected to provide support as requested, use good judgment and take action, as necessary, to resolve problems.



When a call is received requesting assistance, the on-call staff member meets the resident at the Emergency Room and identifies themselves to the appropriate hospital staff. If permitted, they will visit the resident and offer support without making decisions or advising about care and treatment. When medical personnel come in to see the resident, the on-call staff member should excuse themselves from the room and they instruct the Emergency Room staff to contact the Aldersgate nurse on call for any information required on the resident. The on-call staff person is welcome to leave the hospital, when deemed appropriate, if it appears they do not need to remain. They inform staff at

Aldersgate via email if the resident will be admitted to the hospital. Visits typically last between 2-5 hours. Once the resident returns to Aldersgate, the on-call staff member sends out an email to inform staff. On the day following return, the staff member contacts the resident via telephone to inquire how they're doing.

Most exempt staff are required to participate in the program, including managers, directors, and senior staff. A list of eligible participants is pulled and each person is assigned a week. Should they have a conflict during the scheduled week, that person is responsible for finding coverage.

The program strengthens relationships between Aldersgate staff and residents, as well as providing comfort to residents while they're in the Emergency Room. "The residents are why we're in this industry, and the Leadership Care Team enforces that," said Kathlene Hendrick, HR Director, Aldersgate.

Aldersgate's Leadership Care Team not only benefits the residents but helps to build a stronger relationship with the local medical centers and hospitals. Doctors and nursing staff are thrilled to have representatives from Aldersgate supporting the residents. "One doctor hugged me once and said he couldn't believe that I was there," said Hendrick.

# Montessori Aging and Dementia at Clark Retirement Community

Clark Retirement Community's Montessori Aging and Dementia Program began in 2015 when Brian Pangle, President/CEO, Clark Retirement Community, connected with Jennifer Brush, an expert in Montessori for Dementia. Jennifer was interested in conducting research regarding the effects of Montessori programs in a Life Plan Community offering assisted living in a person-centered environment. The Program was initiated in 2017 as a collaborative effort with researchers from Central Michigan University and the University of South Florida.

The Montessori Aging and Dementia Program, which is a person-centered approach to living with dementia, capitalizes on an individual's functional, emotional, and cognitive abilities while implementing compensatory techniques when weaknesses are present. It considers individual factors of family, partnership, culture, and gender as the individual is a respected member of the healthcare team.

Goals of the program for Clark's Franklin campus included:

1. Increase positive resident outcomes, such as engagement in purposeful activities
2. Educate and mentor staff in the Montessori for Aging and Dementia Program
3. Improve staff's emotional ability to care for dementia residents and increase job satisfaction

Clark selected its Franklin campus to be the Participants and the Keller Lake campus as the Control Group. All participating residents were assessed prior to and at the end of the study to assess their quality of life, and staff were interviewed regarding their perceptions of aging and dementia as well as job satisfaction.

Techniques for integrating a Montessori approach included creating an environment to engage residents. As an example, staff assisted



residents in selecting a meaningful photo to them, either recent or from earlier in life, which is displayed by the entrance to their apartment with a personalized nameplate. This helped residents to easily recognize their home and feel a stronger, warmer sense of self. These nametags have been a huge success enabling residents to feel comfortable in starting a conversation with someone because they can readily see their name.

Additionally, staff come up with activities based on resident interest and abilities with signage created explaining how to complete the activities. The goal of these activities is to promote independence as well as strengthen and improve cognitive ability. Residents are welcome to complete activities together or individually. It is not uncommon to see high-functioning residents voluntarily work side by side with low-functioning residents participating in an activity.

Roles are customized for each resident based on previous roles in their lives. For instance, one resident was an engineer who worked with heavy equipment. He now enjoys going to the workshop, cleaning floors, and dusting around the saws. He loved the smell of saw dust and felt right at home.

29 residents with dementia or other cognitive impairment and 22 Clark employees participated in the Montessori Aging and Dementia Program. Data showed an overall improvement in residents' quality of life, staff feeling comfortable working with residents with dementia, and staff experiencing greater job satisfaction. Families of residents were impressed and astounded by the positive program results.

This project has demonstrated clearly that residents living with dementia are capable of having a voice in their care and want to have a choice in how they receive care and spend their day. These choices can be routine, such as folding clothing and simple activities, or more difficult, such as end-of-life care.

“For Clark, coming from a person-centered standpoint, this program has been a game changer,” said Brian Pangle. “It has changed how we approach working with people with dementia and we’ve created a great culture for residents and staff.”

Clark is in the process of expanding the Montessori for Aging and Dementia Program on its Keller Lake campus by purchasing signage and developing integrated activities. Clark plans to continue with large group activities in addition to the Montessori Program to enhance daily activities. As new staff join Clark, they are trained and educated in the Montessori philosophy.

# Rock Steady Boxing at Edgewood

*Rock Steady Boxing* at Edgewood empowers residents with Parkinson's disease to fight back. Rock Steady Boxing is the first boxing program in the country dedicated to fight against Parkinson's.

The exercises are variations of boxing drills, where participants condition for optimal agility, speed, muscular endurance, accuracy, hand-eye coordination, footwork, and overall strength to overcome their opponent: Parkinson's. While each class may vary, they are designed to be rigorous and push participants beyond their perceptions of what they can achieve.

"The workouts are challenging and sometimes risky," said Nancy Ryan, Wellness Specialist. "Some exercises require getting up and down off the floor, which challenges residents' balance. However, it's through these movements that they learn how to fall without hurting themselves."

Music is played during the classes to serve as an external clue to facilitate movement. Participants keep the beat as they go through the movements and often start singing along, which helps with brain associations. Edgewood utilizes various radio stations to provide music during the classes.

Edgewood's classes take place twice a week for 2 hours and offer space for up to 15 participants per class, a 1:1 ratio between participant and volunteer. Volunteers are residents, their families, and exercise science students from a nearby college.

To recruit volunteers, Edgewood hosted an "open house" class for people to participate in and learn about the program. Potential volunteers got to take part in the program and learn about the variety of programming offered, to determine if the program would be something in which they would be interested in supporting.



“We’ve found that afternoon classes are the best for our residents,” said Nancy. “Mornings can be more challenging for them.”

Rock Steady Boxing originated in Indianapolis, Indiana and has more than 700 affiliates across the country. According to Rock Steady Boxing’s website, affiliation is an opportunity to replicate the Rock Steady model within a community, where it may “address the quality of life needs of men and women dealing with Parkinson’s disease.”

Edgewood began the Rock Steady program in 2016 when Ryan attended training in Indianapolis. “Paula Kelley, our former Director of Life Enrichment, saw a news story on the local station and we thought it could be a valuable addition to the community,” said Ryan. Ryan attended training in Indianapolis, which included hands-on training with those with Parkinson’s disease. “They were using speed bags! If it weren’t for the telltale tremor, I wouldn’t believe they had Parkinson’s.”

While there was a learning curve, Edgewood’s wellness staff found that it was easy to get residents and staff onboard with the program and eight residents with Parkinson’s signed up immediately.

Participants’ development is measured through assessments and standardized tests. Before beginning the program, participants take an assessment test and they retake the assessment every three months. Participants have seen vast improvements in their functional movements and have found that balance training is the most valuable aspect of the program.

# Creative Arts at Mather LifeWays

Mather LifeWays uses creative arts engagement to enhance quality of life for residents across the continuum of living by focusing on the link between creative expression and wellness. Each Mather LifeWays community offers a signature creative arts program designed to support wellness, social connection, and brain health through drawing, painting, ceramics, fiber arts, poetry, and other media under the guidance of a professional art therapist.

The Creative Arts Program was initiated in 2012, with the goal of bridging the arts, psychology, and healthcare while establishing creative connections between residents, families, and employees. In order to achieve these goals, art therapists took a ground-up approach, customizing each program to the need and interests of each community. This resulted in creative arts programs that are deeply connected to the stories, relationships, and strengths of their community.

The creative arts team has established custom programs within each Mather LifeWays community. For example, Mather Place, a rental community in Wilmette, offers an “open studio” in which residents may drop in to create art, attend workshops, or engage in an interactive art history lecture. The studio also offers one-on-one sessions using the arts and a listening ear to address major life transitions, such as grief and loss.

Within the Life Centre, the care venue at The Mather in Evanston, IL, the art therapy program redefines care beyond solely biomedical treatment. Art therapists work as part of the clinical team, providing individual and group sessions tailored to the individual needs of each resident by encouraging social connection, addressing pain management and anxiety, processing major life transitions, or providing a non-verbal form of communication. Memory



support residents experience artmaking and exhibition, collaboration with area schools for intergenerational art making, and connection with caregivers and family members through creating together.

Each program reflects its surrounding culture and environment. For instance, residents participating in the creative arts program at Splendido, a Life Plan Community in Tucson, AZ, enjoy incorporating southwestern culture, the desert eco-system, and horticulture into creative experiences. Residents of The Mather write poetry inspired by artwork on display at the Art Institute of Chicago and collaborate with Art Institute of Chicago students or even Chicago Symphony Orchestra musicians.

Some residents self-select as having artistic backgrounds, but the creative arts team also seeks to reach residents that may not think of themselves as creative. “We’ve found that the program is often most successful with individuals who have not previously identified themselves as being an artist,” says Caroline Edasis, Mather LifeWays Director of Creative Arts. “If they are new to a craft, they are not comparing themselves to what they were able to achieve at an earlier time, and they do not limit themselves to the materials with which they are familiar.”

Mather LifeWays creative arts program has received numerous awards and recognition, including a 2017 McKnights Gold Award in the “High Tech High Touch” category for the innovative use of smartpen technology to share older adults’ creative voices. The Creative Arts Program also received the 2015 McKnights Silver Award in “Dignity through Technology” for use of stop-motion animated videos in resident art therapy programs.



## Tips for developing a creative arts program in your community:

- ✓ **Mindset shift**  
Break from the traditional arts and crafts model to encourage individual self-expression rather than emphasizing skill acquisition or creating uniform products. How can you use the creative arts to connect with what is important to each person and develop more intimate relationships with residents, staff, and families?
- ✓ **Staffing**  
Hire an art therapist or acquire an intern with a background in psychosocial wellness/therapy and creative arts.
- ✓ **Think beyond “craft” projects**  
Explore the therapeutic potential of different art materials. Watercolors can be a great way to cultivate relaxation and a sense of flow, while magazine collage can be a great way to engage new participants. Working on a shared piece of artwork can also be a great way to build community.
- ✓ **Exhibit**  
Be aware of the power of sharing artwork through exhibition. Treat creations with respect even when they don’t look like “traditional” fine art. Encourage creators to write about, or title their work. Sharing artwork through exhibition can create new opportunities for community members to see each other’s strengths and share stories.
- ✓ **Start from the ground up**  
Connect with residents and frontline staff! Ask what residents and staff do for fun. From storytelling, to painting or attending performing arts events, it provides a creative arts foundation within your community.
- ✓ **Encourage employee creativity**  
Consider using art experiences as an opportunity for staff self-care. Employees need time to relax, share personal meaning, and process loss when residents pass away. Art can be a great way to support both residents and employees!

# Lend an Ear at Vicar's Landing

It has become apparent over the past several years that hard of hearing and deaf older adults have been forgotten. Medicare does not cover the cost of hearing aids, leaving many older adults helpless because they cannot afford the cost. The Lend an Ear Outreach program was launched in 2012 by a grassroots group and was adopted into Vicar's Landing in 2016.

Lend an Ear has partnered with local audiologists to provide free exams and, upon diagnosis, help to fit a refurbished hearing aid at low- to no-cost to low income older adults and students. 40-50 percent of the donated hearing aids can be reprogrammed with the rest used for parts to rebuild other devices. The program is managed by Vicar's Landing's Scott Hetzinger, Director of Security and Transportation and relies on volunteers (or "Amplifiers") to administer and market the program.

Audiologists are contracted and may see up to five patients a month at no cost. Patients receive a free exam, fitting and instruction on the care of the devices. Currently, Lend an Ear has two audiologists, and is looking to partner with more in the near future.

George Clapp, a hearing aid recipient, shared: "Since getting properly fitted hearing aids, I have made many new discoveries. I never realized my cell phone makes noises when I tap it, that my dishwasher beeps when turned on, and now I hear my cat meowing at me when it is hungry! Perhaps most importantly, I am able to hear cars and movement around me when on my bike or when taking a walk. I am still making new hearing discoveries every day!"

"No longer can someone talk about me because I hear everything!" another recipient joked after receiving a hearing aid.

Fundraising for Lend an Ear comes from events, such as an annual golf tournament and gala,



*Lend an Ear audiologist fits patient with a hearing aid*



*Lend an Ear donates a hearing aid to Saint Johns County Schools*

and generous donations. Donation boxes are dispersed throughout the community, where contributions of money or used hearing aids may be dropped off. The grassroots campaign method is working for Lend an Ear, and they are experiencing an increase in hearing aid and financial donations.

As Lend an Ear's momentum grows, the larger community is expressing a need. St. Johns County schools, for instance, has 150 students with hearing issues. While many students have hearing aids, they are often misplaced or damaged. The inability to hear their teachers and classmates can be a barrier to their education. The school system will provide hearing aids for hard-of-hearing students to use, but they must be kept at school so the children miss out on conversations with family and friends outside of school.

Lend an Ear is expanding quickly, and Vicar's Landing looks forward to seeing how it continues to develop. The organization is developing a franchise model so the program could be replicated across the nation. "Lend an Ear Outreach changes and grows every day," said Scott.



# **Resident Recruitment & Retention**

Marketplace Café at Bishop Gadsden

Early Advantage at Carolina Meadows

Gold Club at Kāhala Nui

You're First Home Care at Montereau

Person First at Saint John's On The Lake

# Marketplace Café at Bishop Gadsden

The Marketplace Café is a central hub for residents, family, friends, and staff at Bishop Gadsden to “break bread fresh from the oven”, so to speak. The open-concept space features dining stations ranging from a salad bar to southern classics, and everything in between.

Each station allows residents to watch staff make their meal in front of them, allowing for complete transparency. Residents work with staff to customize each ingredient in their meals to meet their dietary needs, whether watching sodium or being on a specialized diet. Residents are also able to customize portion sizes, offering small or large options upon request.

Dining stations include:

- Downhome – a variety of southern classics including meats and spaghetti
- Grill – burgers, fries, hot sandwiches, and specials
- Deli – a gourmet display of sandwich meats, cheese, and toppings
- Salad bar – large and expansive, covers “trendy” items like grains and edamame to classic favorites
- Italian – the most popular cuisine, includes made-to-order pastas, a brick pizza oven, charcuterie platters, and casseroles
- Bakery – makes all the breads that are served in restaurants on campus, while also offering customers the opportunity to select a pastry and coffee any time of the day.
- Flex – currently an Asian/Mongolian grill, this space “flexes” to the needs of the community.



The space was inspired by the College of Charleston's café, which feeds 4,000 for lunch each day through its "station" approach to dining. "Colleges are the forefront of culinary trends, which is later adapted by hospitals," shared Jim Epper, Director of Culinary Services.

Bill Trawick, CEO; Sarah Tipton, Vice President/COO; and Jim Epper decided to replicate the concept on a smaller level at Bishop Gadsden. "We intentionally did not use a senior living community design consultant, but rather sought a consultant from the hospitality/college arena," said Trawick. "This has resulted in an upbeat, high-energy hub of resident activity with an array of mix-and-match dining choices."

While residents remained hesitant through the transition, they were "blown away" when the doors opened. "It has been a key driver of our resident satisfaction and an invaluable marketing asset," said Trawick.

Marketplace Café serves breakfast from 7-9 a.m., lunch from 11:30 – 1:30 p.m., and dinner from 5-7 p.m. The café is open from 7 a.m. to 7 p.m. for residents looking for ice cream, cookies, coffee, or grab-and-go items. "Lines in the café grow every day, and we've seen a steady rise in sales," said Epper.

# Early Advantage at Carolina Meadows

Carolina Meadows' Early Advantage Program was established to ease residents' transition into independent living. It connects off-campus Ready List residents to on-campus programs, such as social, educational, and cultural activities; allows use of Carolina Meadows common areas; and offers resident rate meals at any of Carolina Meadows' six dining venues. The program provides the residency experience for those who want to be at Carolina Meadows and cannot get into their ideal home in the timeframe they are seeking. Membership in the Early Advantage Program requires the same standards as residency, in which a prospect must be able to live independently. However, should needs change prior to an on-campus move-in, a member is able to access higher levels of care.



The need for the Early Advantage Program was identified as the waitlist grew for Carolina Meadows. The team noticed that they were feeding into competitors due to the long lead time and had a problem to overcome: how do you stop those people from moving into another community, even if they love Carolina Meadows and would be a great culture fit?



Early Advantage was launched slowly in May 2017, allowing time to bring the idea to the market and manage possible challenges as the program grew. Sales goals were limited to four memberships per month, but due to market interest, Carolina Meadows expanded their membership maximum to eight per month.



Ready List members, Wait list members and prospects were invited to attend an information session prior to launch, which explained how the program was different to Carolina Meadows' current Equity Advantage model.

Although the Early Advantage program allows those on the Ready List to participate in campus programs, it does not allow them to skip ahead

on the Ready List. This was key for those who were not interested in joining the program, ensuring their interest was protected.

Program development was a collaborative team effort, taking into consideration the challenges each department would encounter by welcoming additional customers into the community. For instance, the transportation department expressed concerns regarding a higher demand for offsite appointments. Additionally, involving the team helped to mitigate the fear factor of launching a new program, instilling confidence that trickled down to the residents. “The more people you bring to the table, the greater the program’s success and more excitement is generated,” said Whitney Harris, Senior Sales Specialist.

The program is targeted to younger residents who had recently joined the Wait List or Ready List and are several years from move-in. It has also been successful with older adults who care for their significant other. While they are not eligible to move in if their significant other is not able to live independently, the program provides assistance and peace of mind should an event arise in which the caretaker requires assistance.

An unexpected benefit to Early Advantage Members occurred when preparing for several severe storms that swept the area in 2018. Carolina Meadows included Early Advantage Members in communications regarding emergency preparedness and provided support, as needed. Carolina Meadows was open for Members who needed a place to go, and Members often forwarded Carolina Meadows storm updates to friends and family in the area, utilizing it as an opportunity to maintain regular storm updates and developments. Several of the Members shared that they were “blown away by the experience” and were reassured by having a safe haven, should a problem arise.

Measurements of success have adapted as the program has grown. While it was initially based on whether the program would do well in the market, success is now measured by the relationships built between Early Advantage Members and residents. “We can’t monetize the value of connection between residents and members,” shared Whitney.

For organizations considering implementing a similar program, Whitney recommends keeping an open mind. The Early Advantage program originated initially as a concept born out of numerous board and senior leadership discussions on whether or not to enter into the Continuing Care at Home (CCaH) model of care. Our response to CCaH and the resulting Early Advantage Program developed organically as staff collaborated on best practices. “We act like water and flow where gravity takes us,” shared Whitney. Starting with the leadership team, a safe space was created should expectations need to change, allowing the program to flow and roll out in a way that works best for the organization.



# Gold Club at Kāhala Nui

With more than 385 families on the waitlist and wait times exceeding five years, Kāhala Nui's leadership team saw the need to support the waitlist by initiating the Gold Club program. Prospective residents become members of the Gold Club by joining the waitlist and are eligible to attend on-campus exercise classes, social activities, and can take advantage of housekeeping, home maintenance services, transportation, care coordination and meals for an additional charge.

“When someone's been on the waitlist for two to three years, and it's their time to move in, they're walking into unknown territory and it can be very intimidating,” says Daryn Murai, Interim Director of Marketing and Community Outreach. “But having them come to different events on campus has really allowed them to feel part of the community before they actually have to move ultimately softening the transition of moving into a new home and environment.”

The Gold Club began in an abbreviated form and has since expanded to fulfill the dimensions of active aging initiatives, and include programs that keep members fully engaged with the community, explore possibilities that lie ahead of them as future residents, and teach them how to live meaningfully. Among the programs are Movie of the Month; fitness classes such as Zumba, yoga, and personal training; “After Dark” socials featuring local musicians; and intellectually-stimulating lectures featuring esteemed speakers. Residents are welcome to attend Gold Club events as well, but attendance is limited to allow Gold Club members priority.

“While developing the program has been a process of trial and error, tweaking the program as we go has made it more fun for members,” said Murai.



*Gold Club Members dance and mingle with residents at Kāhala Nui's Valentine's Day event*



The Gold Club program has helped to develop relationships between the waitlist, residents, and staff. The marketing team attends each event and activity to build relationships with members and residents often volunteer to help with check-in for events.

“The program has been very well received and is a way for us to keep people engaged with Kāhala Nui,” said Patrick Duarte, CEO. “The members like it as it gives them an opportunity to get to know some of the people they will be living with in the future.”

Kāhala Nui determines success of the Gold Club by attendance and member feedback. They have held events which have ‘sold out’ within one week of announcing the event, and members often thank staff for providing these opportunities.

# You're First Home Care at Monterey

Monterey introduced the You're First Home Care Program in 2003, a personal care and companion service to support residents throughout the community. You're First is a fee-based program offering a wide variety of services to meet resident needs, including:

- bathing, grooming, dressing assistance
- assistance with walking, transferring
- medication management and reminders
- post-operative care
- transportation to appointments
- preparing healthy snacks and meals
- light housekeeping, home organization and laundry
- letter writing, office work
- companionship, socialization services
- pet care including dog walking.

Monterey's You're First Department selects experienced caregivers and certified nurse assistants. Each new employee must complete an orientation and training program prior to placement with a resident. The Program Manager strives to ensure that each resident is matched with a caregiver that understands the personal needs of the resident, their interests, personality and expectations.

The You're First Department reorganized in 2014 with a new leadership team focused on driving success. The team, led by Hannah Orth You're First Manager, explored and established new processes and procedures to better serve the Monterey residents. Examples of the new processes and procedures included implementation of a Client's Bill of Rights, Terms and Conditions of Services, personalized care plans, scheduling/billing software and additional employee training. In 2018, an electronic application for caregivers was established that allows caregivers to use their phone to view individualized resident care plans, clock in/out



and share feedback to the You're First Department regarding resident care.

You're First has experienced significant success since the reorganization from both a resident satisfaction and financial perspective. The Department employs 60 caregivers and certified nurse assistants. Monthly, the You're First Staff provides over 10,000 hours of care on average which translates roughly to \$250,000 in revenue. There is a clear need to expand the reach of the Program. Efforts are underway for You're First to be approved and designated as a home care program for the Veteran's Administration.

# Person First at Saint John's On The Lake

Saint John's On The Lake's Person First philosophy began more than two decades ago and has since evolved to accommodate a younger resident population. It began in the care neighborhoods in the 90s and has since expanded into numerous resident/employee partnerships in the independent living apartments. A particular catalyst was the development of the South Tower in 2011, when residents were invited to participate in planning and execution of tasks that may have otherwise been delegated to staff, allowing staff to assume a facilitator role.

Today, Saint John's On The Lake has very active and involved residents responsible for various areas of the building, such as the library, or programs and budgets that correspond with such.

Residents identify opportunities within the community and volunteer to assist. For instance, a couple residents recognized that the resident handbook was written in a way that was administrative and challenging to read. By working with staff, residents were able to rewrite the resident handbook in a format that is succinct, well-organized, cross-referenced, and pleasant to read.

Additional tasks managed by residents include archiving Saint John's On The Lake's history, establishing and maintaining a culinary committee, and establishing a wellness committee that empowers residents to develop programs within the community. "Residents expect to be involved in the community, this is their home," said Donna Spars, VP of Lifestyle.

"Residents are engaged and feel ownership [in the community]," said Renee Anderson, CEO. "The approach has helped manage staff expenses and keeps residents physically, socially, and intellectually stimulated, resulting in a happier place to live and work."



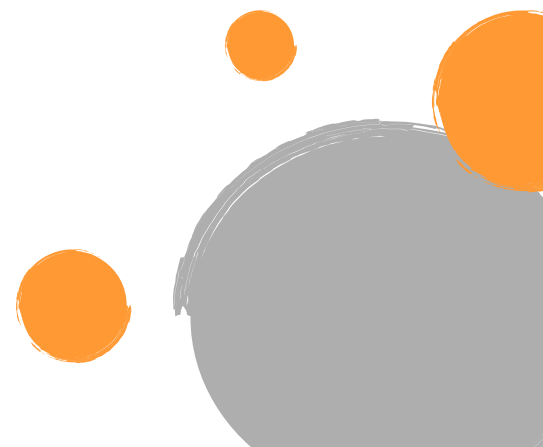
*Saint John's On The Lake Choir*



*Saint John's On The Lake Newcomers Reception*

Residents and their family are proud to be part of the Saint John's On The Lake community, which is reflected in survey results and the wait list, where a significant number of depositors have been recommended by residents.

"We see residents as a resource of time and knowledge; we've tapped into the resource to help create community," said Anderson.





# **Staff Recruitment & Retention**

Immanuel *Spirit* at Immanuel Lutheran

Between Us at Lambeth House

RITE Rewards at Lenbrook

LIVE Partners at Moorings Park

Leadership Academy at The Osborn

# Immanuel *Spirit* at Immanuel Lutheran

The Immanuel *Spirit* is a set of 15 commitments that define shared values, attitudes, standards, and behaviors that characterize Immanuel Lutheran Communities workplace and team. The program began in 2010 to inform behaviors and attitudes at the community, defining who Immanuel Lutheran Communities is and how the team operates.

The Immanuel *Spirit* was conceived when senior management began to discuss the ideal way for decisions to be made within the community and how they wanted to treat staff, residents, family, and potential residents. The *Spirit* began with 12 original commitments, with language that enabled staff to hold each other accountable.

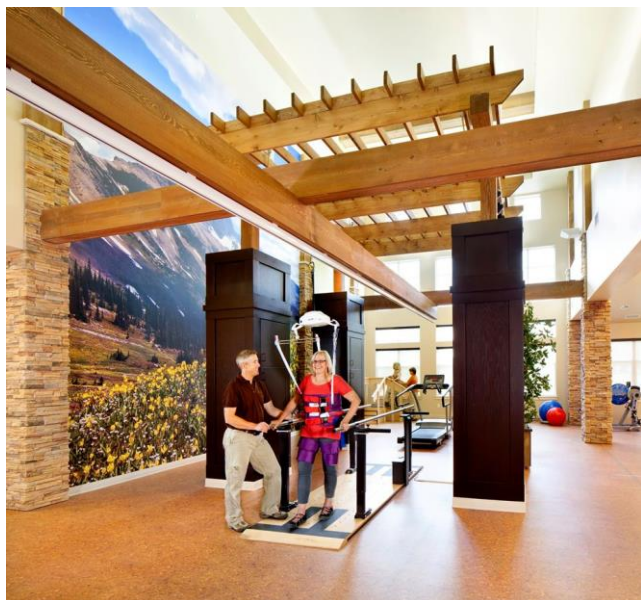
The Immanuel *Spirit* subsequently underwent redevelopment, combining some of the original 12 commitments and including a few more. Through the redevelopment process, senior management recommitted to the *Spirit* and the Immanuel Lutheran Board approved changes to the commitment. The program was then rolled out to supervisors, who helped launch with front line staff in 2014.

“We were purposeful when integrating *Spirit* within the community to ensure it isn’t just another program,” said Carla Wilton, Executive Director of Buffalo Hill Terrace. “No matter where you are in the community, our staff know where to find a *Spirit* poster, and leadership talk about it regularly.”

All team members commit to the *Spirit* upon employment at Immanuel Lutheran. The Immanuel *Spirit* is integrated into the culture through orientation, and posters in conference rooms and employee break rooms, which serve as a reminder for both staff and residents. Posters showcase Immanuel Lutheran’s mission, core values, and the 15 *Spirit* commitments, which are used for regular standup meetings in each department. Staff are



*Fitness Coordinator guides a strength and balance class*



*Director of The Retreat at Buffalo Hill demonstrating Immanuel Lutheran Communities rehabilitation services*



encouraged to choose one commitment and discuss how it relates to the day at hand, what it has taught them, and how it can help in establishing goals and informing decisions.

Front line staff are encouraged to hold themselves accountable, using *Spirit* as a guideline in service recovery when they aren't able to meet all of the commitments.

It's challenging to memorize all the commitments, so staff are encouraged to reference a values card containing Immanuel Lutheran Communities motto, mission, service expectation and service recovery acronyms, and the 15 commitments.

To do my part in providing stellar service, I promise to...			
1. Embrace and value our differences, while assuming positive intentions.	4. Strive to anticipate others' needs and act accordingly.	9. Maintain high levels of professionalism, in both conduct and appearance, at all times.	13. Contribute to an atmosphere of positivity, teamwork, and mutual support.
2. Treat everyone with courteous respect.	5. Treat everyone with importance.	10. Respond to every problem I see.	14. Focus on living a balanced life—body, mind, and spirit.
3. Greet everyone warmly, by name and with a smile.	6. Hold myself and my colleagues accountable.	11. Pay attention to details.	15. Lead by example.
	7. Listen and respond positively in a timely manner.	12. Ask, "Is there anything else I can do for you?"	
	8. Put the well-being of residents, guests, and fellow team members ahead of my own.		

Culture at Immanuel Lutheran has been strongly influenced by the implementation of *Spirit*. "Residents know about the commitments and understand how they affect all relationships and decisions made at the community," said Carla. "You can feel its presence in the community." Since launching the Immanuel *Spirit*, employee retention is five times what it was before. The philosophy has helped to define the culture at Immanuel Lutheran Communities, resulting in higher employee satisfaction scores.

# Between Us at Lambeth House

Lambeth House's Employee Mentoring Program, *Between Us*, was introduced by Daphne Dominguez, Director of Assisted Living, after participating in the 2016-2017 Novare Leadership Development Program. Daphne's initial idea was to enhance employee engagement and improve the new hire experience through mentorship with a goal to strengthen employee retention by 10 percent in new hires. Since the program's inception, it has been a work in progress and a learning experience. Lambeth House is excited to announce the program is now in the final stages.

The mission of *Between Us* is to identify and develop exemplary employees with the tools to coach, encourage, and lead others with the ultimate goal to strengthen employee engagement and retention. Mentors will demonstrate the highest level of performance and promote the community's core values.

The mentorship opportunity will be marketed to current employees through monthly employee meetings, displays at the HR kiosk, information boards, and employee break rooms. Employees considered for the mentor program are the shining Lambeth House employees with an interest in leading others and who live by Lambeth House's core values. Potential mentors stand out for setting great examples within the community and must be employed in good standing for at least one year. Potential mentors complete an application and interview process.

Once an employee is accepted into the mentor program, the employee goes through extensive development training for 3-4 months. The program will include an overview of the value of mentoring, four education sessions with a focus on core values, self-awareness, and leadership, and a graduation ceremony. Upon completion of the program, the mentors will receive financial



*Lambeth House staff preparing for Give NOLA Day, a fundraiser benefiting the Lambeth House Foundation*



*Culinary staff prepare a Mardi Gras favorite: King Cake*

support for participating and are eligible for a one percent raise.

Following graduation, mentors will be involved in the new employee onboarding experience, community partnerships, and continuous development opportunities in employee education. The long-term goal of Lambeth House's mentor program is to reduce overall employee turnover and boost employee engagement in a positive work environment.

# RITE Rewards at Lenbrook

In 2017, Lenbrook established the RITE Rewards Program to provide increased positive feedback for its associates and encourage desired behaviors.

The RITE Rewards Program was inspired by an article in the Harvard Business Review entitled “The Ideal Praise-to-Criticism Ratio”. It suggested that high-functioning teams maintain a ratio of six positive comments for every constructive comment that is made. Lenbrook senior staff noticed an opportunity within their organization to focus on providing positive feedback for associates.

Through this program, Lenbrook is recognizing the behaviors it wants to promote, creating leaders that are modeling Lenbrook values and behaviors and allowing residents and associates to use their voices to further develop a high-functioning team.

RITE Rewards provides residents, associates and other stakeholders an opportunity to recognize an associate when they model The Lenbrook Way service standards (Caring, Competency, Responsiveness, Beautiful Community and Appealing Amenities) or the Lenbrook values (RITE – Respect, Integrity, Teamwork and Excellence).

When a resident or associate witnesses an associate acting according to The Lenbrook Way or Lenbrook’s values, they may be nominated to receive points. Nomination forms are available around the community and are entered into the community portal by management, or employees can enter their nominations directly into the portal.

A peer review committee reviews the nominations to confirm that they are appropriate and align with Lenbrook’s values and service standards. Annually, Lenbrook receives more than 3,000 nominations, with 60 percent coming



from staff and 40 percent from residents. The RITE Rewards Program is an opportunity for residents to reward staff, as Lenbrook has a no tipping policy.

Points are awarded on an employee portal where they can be used to make purchases on Amazon, earn Lenbrook “swag,” and purchase transit cards. 500 points is \$5, and employees have saved their points for big purchases like Macbook computers. Earnings through the program are taxable.

Since the RITE Rewards Program launch in 2017, associates have been more engaged and Lenbrook has seen a rise in employee retention.

# LIVE Partners at Moorings Park

The LIVE Program at Moorings Park is designed for employees (“partners”) with the goals of reducing staff turnover and deepening the employee experience. “LIVE” stands for Lives Inspired by Values and Education, and it provides training and learning opportunities; support for partners and the greater community; appreciation and recognition for partners; and promotes wellness with monthly wellness tips.

One of the programs within LIVE that is designed to provide training and learning opportunities to high potential partners is a year-long leadership program. The leadership program stemmed as an opportunity to grow talent within the organization to ensure future growth and to instill a strong culture as the organization develops and adds more campuses. “A priority for us is keeping Moorings Park’s strong culture as we establish new communities,” said Larisa Zadorecky, Vice President of Human Resources. “It’s important that our residents and partners experience consistent values across each campus.”

Participants are required to complete a set of “core” courses through Pryor Learning Solutions, and are encouraged to participate in elective courses. Online coursework is followed by weekly in-person sessions where Moorings Park management staff provide training on quality improvement, social accountability, projecting and managing budgets, human resources, strategic planning, and a SWOT analysis.

Participants in LIVE Leadership have an opportunity to shadow an executive for 8-weeks, including meetings with staff, meeting the Board of Directors and residents, and participating in clinical rounds. The shadowing opportunity is a highlight of the program as it allows participants to learn the challenges of an executive role and experience different management styles in the workplace. Following shadowing, participants



*LIVE Leadership facilities habitat project*



*LIVE Leadership luncheon with executive staff*

share a final presentation with the class demonstrating what they learned.

At the conclusion of the program, participants complete a SWOT analysis of Moorings Park and have an opportunity to participate in a Q&A session with the CEO, Dan Lavender. Graduates of LIVE Leadership become members of the Leadership Team and participate in ongoing development opportunities. They are considered “high potential partners” and are identified on the organization’s succession plan.

One measure of success for the leadership program is determined by a self-assessment survey that is completed by participants before starting the program and again following graduation. Many graduates utilize the skills and self-awareness they’ve learned through the leadership program to achieve promotions within Moorings Park.

# Leadership Academy at The Osborn

For LeadingAge New York's Leadership Academy action learning project, Maria Siano, Assistant Director of HR, thought to establish a similar management training program that would be unique to The Osborn. Maria saw a need for additional development of middle-management and was seeking a solution that wouldn't involve expensive programming costs and time away from the office. Maria teamed with Chris Ferreri, COO, to compare notes from leadership development programs in which they had participated, define the best concepts, and fine tune them to meet The Osborn's needs.

In order to customize the program for The Osborn, the design team integrated books, articles, and activities that encourages discussion about The Osborn's mission, vision, and values. The design team also developed a final project which asks participants to identify an issue within the organization that they would like to change, determine a possible resolution to the issue, and put it into action. With the completion of the inaugural 2018 program, 20-30 projects will have been completed that will help build a better organization for management and staff.

Participants were chosen from across the organization, and the inaugural 2018 program included 35 mid- to senior-level middle management and coaches. Coaches are executive staff who meet with a small group of participants between sessions to provide additional instruction and guidance.

"A concern we had when starting the program was whether participants would feel comfortable sharing their concerns and opportunities with colleagues and executive staff", said Chris Ferreri. "But through the coaches' honesty, participants developed comfort and become more open".



*Leadership Academy participants proudly display graduation certificates*



*Leadership Academy participant presents his final project, identifying a solution to an organizational issue*



Participants also believed that the coaches provided an invaluable resource for the Leadership Academy. “The fact that the CEO, COO, VP of HR and Assistant Director of HR spent their time presenting and mentoring our team speaks volumes about the value of the program,” shared Debbie Lynch, Director of Resident Assessment. “I have strengthened bonds with my colleagues...through this shared experience and learned practical tools for being a leader. The most important takeaway for me is a method to approach change organizationally and personally. Change is inevitable and difficult. I now have the tools to facilitate and manage positive changes for my team.”

Additionally, The Osborn has found managers from varying departments connecting and engaging in thought-provoking conversations, discussing concerns and serving as a sounding board, as needed. The inaugural program participants graduated in December 2018 and the design team plans to keep the momentum going.

Maria foresees this program assisting with recruitment and retention. “It shows incoming team members that we are committed to staff development and helping staff understand the value of working for this organization”, Maria said.