

LEAD

Leadership | Excellence | Administration | Development

**Assisted Living
EXECUTIVE
Training Program**
October 19-28, 2021
VIRTUAL EXPERIENCE



COURSE OVERVIEW

The LEAD (Leadership Excellence Administration Development) Program has been specifically designed by professionals to enable assisted living executives to excel in their administrative duties and achieve success in their profession. The curriculum has been written and compiled by the presenters and trainers under the direction of the Washington Health Care Association and meets the requirements for administrator training, WAC 388-78A-2520.

This virtual experience will be offered in a series of meetings on seven different days. The training will include 28 hours of presentation allowing for Q&A and will be offered via Zoom platform.

Executives will embark on a journey of education, training, and proficiency that will culminate with confidence, capability, and efficiency. Assisted living professionals at every level and with any amount of experience will be enhanced by this training program. The program is written to address the domains covered in the assisted living aspect of the National Association of Long Term Care Administrator Boards (NAB) Healthcare Services Executive (HSE) exam for senior living professionals.

Each participant will receive all training materials prior to the initial class. Materials will be sent via FedEx to the address used during the registration process.

The course is enhanced by four webinars that participants will be able to access at any time. No additional CEUs are awarded for the webinars listed below; however, they complement the material covered in this class and are recommended to all participants.

- › **Leadership- Is Anyone Following?** Jean Steel
- › **Strategic Planning – The Executive Vision,** Dan Mahoney
- › **Environmental Care – Care for the Sticks and Stones,** Elena Madrid
- › **Finance and Budget: Making Cents of it All,** Stuart Brown

With webinars and live virtual session training, this class offers more than 36 hours of training. The course is approved for 28 hours of credit for assisted living professionals from the Department of Social and Health Services.

COURSE SCHEDULE

The LEAD Executive Training Program is being offered virtually and requires that participants engage in each session to complete the course. Participants will need a quiet place without interruption as they will be required to engage in each session via video and audio to ensure participation in discussion and small group activities that are part of the course. Participants need to ensure they have a computer, internet access, uninterrupted time to participate in sessions, and course materials (which will be sent via FedEx to the address provided during registration).

The LEAD class Zoom session schedule is as follows:

October 19	9 – 11 AM
October 19	1 – 3 PM
October 20	9 – 11 AM
October 20	1 – 3 PM
October 21	9 – 11 AM
October 21	1 – 3 PM
October 22	9 – 11 AM
October 22	1 – 3 PM
October 26	9 – 11 AM
October 26	1 – 3 PM
October 27	9 – 11 AM
October 27	1 – 3 PM
October 28	9 – 11 AM
October 28	1 – 3 PM

Remember, participants must have:

- A desktop or laptop computer
- Reliable internet access
- Uninterrupted time to engage in all sessions
- Class materials that will be sent to the address provided during registration
- Ability to navigate Zoom (Click [here](#) for an introduction to Zoom meetings.)

CEUs

This program is approved for 28 continuing education units certified by the Washington State Department of Social and Health Services. This program fulfills the requirement for administrator training in assisted living and is state-specific for Washington.

COURSE DOMAINS

- Customer Care, Support, and Services
- Human Resources Management
- Physical Environment Management
- Financial Management
- Leadership and Governance

PROVISOS

- All sessions will start on time; please be punctual.
- All participants need to have laptop or desktop computer.
- All participants will need reliable internet access.
- All participants need to understand how to navigate Zoom ([Zoom Guide](#))
- Training sessions are for registered attendees and instructors only.

CANCELLATION POLICY

Cancellations made in writing on or before Wednesday, October 12, 2021, will incur a \$50.00 cancellation fee per registered attendee. All other cancellations will receive no refund.

PROGRAM FEES

Registration includes access to all sessions via Zoom, a complete binder of handout materials and program information that will be sent via FedEx to each registered attendee, access to four webinars to enhance experience, access to presenters for question-and-answer sessions, and up to 28 continuing education units.

WHCA Member	\$750 per person
Non-WHCA Member	\$1500 per person



Registration is limited to 60 individuals for the class to enjoy interactive discussion and small-group activities. Register today if you plan to attend!

COURSE ENHANCEMENT WEBINARS

The LEAD Assisted Living Executive Training Program will be enhanced by four webinars that are two hours each in length to cover topics relevant to the success of any assisted living executive. The four webinars are:

Strategic Planning – The Executive Vision

Dan Mahoney, Presenter

Strategic planning and a vision for the future is essential to the success of any leader. This webinar will focus on the development, maintenance, update, and internal and external messaging around mission, vision, and core values for your organization. Learn how to adopt mission, vision, and values and how to communicate them effectively both within and outside of your organization. Learn how to effectively incorporate your mission, vision and values into your strategic plan. This session will provide guidance on productive and efficient strategic planning, how to implement a plan, and how to get buy-in from every employee within your organization in order to achieve your goals and action plans. Learn how to set reasonable, measurable, and logical goals as well as how to identify the steps needed to take in order to achieve them to build your action plans. You will learn how to identify the proper owner of goals and action plans as well as how to maintain accountability to ensure everyone is working together.

Leadership – Is Anybody Following?

Jean Steel, Presenter

Leadership is only worthwhile if you have a following, and during this session you will learn about the various leadership styles and how to analyze their impact in your organization. In addition, you will learn about the ethics of leadership and how to make decisions based on facts, figures, and your mission, vision, and core values rather than on feelings, friendships, and in order to avoid confrontation. Learn more about how to utilize leadership to build your team and create a culture of inclusion and trust. You will understand how to measure employee satisfaction and learn ways to engage employees to make sure they are following the leader. Finally, learn more about leadership development in order to maintain healthy leaders and to provide aspiring leaders the opportunity to grow and develop within your organization. Finally, you will learn how to identify the facets of your organizational culture so that you can be sure the culture is promoting best practices, engagement, and trust—because culture trumps strategy every time!

Budget and Finance – Making Cents of it All

Stuart Brown, Presenter

The best quality care is only part of the success of an assisted living community. Without proper finance and budget controls in place, communities cannot maintain proper standards of practice and care. Learn how to establish healthy policies and procedures around budget development, accounting practices, financial reporting, and measures. Guidance on how to read financial statements and measure operational margins, cash on hand, staffing, and expenses will be provided. Learn methods to improve financial performance, how to implement internal controls, and what safeguards to utilize for the protection of assets. You will also learn how to review contracts and purchasing agreements to ensure proper supply chain, management of pricing, ordering, shipping, receiving, inventory control, and how to maximize group purchasing options. With regard to staffing, a review of payroll practices and staffing measures and ratio will be provided. Learn how to adjust staffing based on occupancy and acuity to ensure good quality care as well as financial health. With regard to residents, you will learn about resident trust accounts and how to ensure everything is in proper order for each resident. Focus will also be placed on financial analysis in order to identify trends and practices that lead to success. Learn how to monitor changes in the profession that impact financial health.

Environmental Care – Caring for the Sticks and Stones

Elena Madrid, Presenter

Before culture, before care, before residents and staff, there is first the physical plant. Learn about the policies and procedures surrounding routine maintenance, hazardous waste and removal, housekeeping, laundry, infection control, and pest control. It is also important to understand how to monitor the environment to ensure safety and security while promoting choice, comfort, and dignity. Learn about infection control and sanitation as well as how to create a home-like surrounding for residents, staff, and visitors. Learn more about the physical property and the equipment required to maintain it as well as preventative maintenance requirements. This session will also focus on how to identify opportunities to enhance the physical environment to meet changing market demands and resident expectations.

COURSE OUTLINE

October 19 | 9 – 11 AM

- Outlook of Assisted Living in Washington State
- What is assisted living?
- Assisted Living Physical Plant
- What sets assisted living apart from other settings?
- Assisted Living Resident Profile
- Services in Assisted Living
- Resident Payment Options
- Assisted Living Communities in Washington and Medicaid Contracts
- Additional Care Options
- Non-resident Individuals
- Services that May be Provided to Non-resident Individuals
- Policies and Procedures for Resident Care and Service.

Sponsored by Fidalab.

October 19 | 1 – 3 PM

- Intermittent Nursing Services (WAC 388-78A-2310, WAC 246-840)
- Medication Management (WAC 388-78A-2210 through 2290, RCW 69.41)
- Pharmacy Services
- Medication Storage
- Family Assistance with Medications
- Medication Records
- Medication Errors
- Returns, Destruction
- Policies and Procedures Relating to Medication Services

October 20 | 9 – 11 AM

- Pre-move-in Information
- Move-in Process
- Discharge/Move-out Process (RCW 70.129.110)
- Documentation/Resident Information Management
- Assessment
- Negotiated Service Agreement (NSA)
- Activities/Life Enrichment (WAC 388-78A-2180)
- Dining (WAC 388-78A-2300, 2305, WAC 246-215)
- Policies and Procedures
- Meals and Refreshments
- Transportation

Sponsored by Soundview Medical Supply

October 20 | 1 – 3 PM

- Employee Training and Development
- Staff Records
- Orientation and Safety Training
- Basic Training
- Food Handler Cards
- Bloodborne Pathogens
- CPR/First Aid
- Specialty Training
- Continuing Education

October 21 | 9 – 11 AM*Policies and Procedures*

- Workplace Rules
- Employee Disciplinary Steps
- Employee Grievances
- Absenteeism
- Classification
- Exemption Status
- Recruitment, Selection, Retention Practices
- Employee Evaluation Programs
- Employment Termination

October 21 | 1 – 3 PM

- Compensation and Benefits
- Employee Health and Safety Programs
- Evaluation of Employee Satisfaction, Engagement, and Organizational Culture

October 22 | 9 – 11 AM

- Promoting a Safe Work Environment
 - Employee Risk Management
 - Worker's Compensation Claims
 - Drugs and the Workplace
- Communication Methods Among Management and Employees
 - Verbal
 - Written
 - Electronic

October 22 | 1 – 3 PM*Workplace Safety is a Leadership Priority*

- Workplace safety is of utmost importance. Ensuring employees have proper tools, resources, training, and support to conduct and complete their tasks safely must be demonstrated by leaders. During this session, Stephanie Scheurich, Group Manager for Employer Resources Northwest, will provide insight for potential executive directors and administrators on how to create a culture of safety, ways to mitigate risk, how to effectively and appropriately manage any worker's compensation claims that may occur. As well, this session will provide insight on the Group

Retrospective Rating Program (GRRP) hosted by Washington's Department of Labor and Industries (L&I), how the program works, and how to engage in the program to enhance employee and workplace safety. *Sponsored by Employer Resources Northwest.*

October 26 | 9 – 11 AM*Post Survey Process*

- Plans of Correction
- DSHS Enforcement
- IDR
- Appeals of State Citations and Fines

Sponsored by Lane Powell.

October 26 | 1 – 3 PM*Surrogate Decision Makers*

- Capacity and Consent
- Hierarchy of Consent
- POLST
- Death with Dignity

Sponsored by Lane Powell.

October 27 | 9 – 11 AM*Marketing*

- Sales versus Marketing; more specifically
- Selling to the Individual versus Marketing to the Collective
- Share data on recent occupancy trends and why these results occurred
- Research on what is the more efficient means to fill a community

Selling "behaviors" versus Selling "processes"

October 27 | 1 – 3 PM*Census Building*

- Dispel the myth that we cannot sell during times of pandemic
- Specific selling behavior-based tools to develop and execute
- Practice using these tools to confirm applicability in each attendee's community
- Eight specific strategies that, when executed, will provide a blueprint for success

Sponsored by Fidalab.

October 28 | 9 – 11 AM

- Department of Social and Health Services – Divisions and Interaction with Assisted Living
- Washington State Regulations Review Inspections

October 28 | 1 – 3 PM

- Abuse/Neglect
- Mandatory Reporting Investigations

COURSE FACULTY

Stuart D. Brown, the third generation of his family to stand at the helm of Village Concepts, manages and oversees a portfolio of 19 senior living communities in Washington State as chief operating officer. With more than 10 years of senior housing experience, Brown leads the industry with attention and dedication to provide each resident with independence, security and a place to call home. Under Brown's leadership, Village Concepts stands at the forefront of the growing senior care industry with 350 employees and multi-million-dollar construction projects underway to build a state-of-the-art facility in Burien and an affordable senior housing property in Milton. New programming and services, including on-site occupational and physical therapists, provide an unmatched level of comfort and service for residents.

Elena Madrid, RN, BSN, is the Executive Vice President for Regulatory Affairs for Washington Health Care Association (WHCA). She supports WHCA members by providing answers and insight to regulatory questions and expectations. Elena's long and focused background in survey and enforcement as a surveyor and field manager for DSHS provide her with extensive knowledge and insight on regulatory compliance, the survey process, and policies and procedures. Elena also provides support, resources, and training regarding quality. As staff liaison for the Skilled Nursing Quality and Regulatory Executive Advisory Committee, Elena works with members to promote quality care and services at every level. At DSHS Residential Care Services where she was a field manager with oversight of assisted living and skilled nursing communities, Elena was responsible for the supervision of licensors, surveyors, and complaint investigators for assisted living communities, skilled nursing facilities, and adult family homes in eastern Washington. Elena has also worked as a director of nursing in both assisted living and skilled nursing. She is a registered nurse and brings a wealth of knowledge regarding long term care requirements and the regulatory issues affecting long term care providers.

Dan Mahoney is focused on the care and service for seniors as he represents his clients in the acquisition and disposition of senior housing communities— independent living, assisted living, dementia care and skilled nursing. Dan has participated in over 80 senior housing transactions in more than 16 states. He is a trusted advisor to clients when navigating the sales transaction process. Dan joined Marcus & Millichap in 2012 to focus on representing clients in the Northwest

and Mountain States. Dan received the prestigious award of Rookie of the Year for the entire firm in 2013, as well as the National Achievement Award. In 2015 he earned the National Sales Recognition Award along with the National Achievement Award. Prior to joining Marcus & Millichap, Dan served as the Vice President of Real Estate Finance at Sunwest Management where he helped the company grow to 300 senior housing communities prior to 2008. In 2009, Sunwest Management went into bankruptcy where Dan helped the Chief Restructuring Office modify 60 loans and dispose of 35 communities. Additionally, Dan worked at Oregon Housing and Community Services facilitating the transfer of ownership process for communities financed with Elderly & Disable Bonds and Low-Income Housing Tax Credits.

Michael Marlow has been involved in the senior living profession for over 25 years, beginning his career at Hillhaven, and has served in various sales training and senior sales management roles with Vencor, Atria, and Brookdale. These roles have ranged from Regional Sales and Marketing Manager to the National Vice President of Sales at Atria. Mike is currently serving as the VP of Sales Education for Watercrest Senior Living Group. Mike is also a nationally published author and a frequent lecturer at many conferences.

Mike is the author of an ALFA Best of the Best award-winning sales training program. Mike is a proud graduate of the University of Kentucky and Oklahoma State University. He is even more proud of his two children: Bradley, a Physical Therapy Assistant at Beacon Orthopedics in Erlanger, Kentucky, and Jill, a doctoral student in Occupational Therapy at Belmont University in Nashville, Tennessee.

Vicki McNealley, PhD, MN, RN, is the Director of Assisted Living for the Washington Health Care Association (WHCA). Vicki is directly responsible for supporting WHCA member assisted living providers through regulatory clarification, nurse consultation, facility system evaluation, advocacy, and education. Vicki is responsible for developing and implementing WHCA programs to support providers in these areas. As staff liaison for the Assisted Living Quality and Regulatory Executive Advisory Committee, Vicki works with members to promote quality care and services at every level. Vicki spent ten years as the assisted living director for WHCA prior to serving as the Corporate Director of Regulatory Compliance for Village Concepts for over six years. She has extensive experience as a teacher, consultant and provider, and has been involved in assisted living operations and policy work since 1999. Vicki has served as a national award reviewer for the

American Health Care Association and worked closely with the American Assisted Living Nurses Association to develop its certification exam. Vicki is a registered nurse with a master's degree in community health nursing and a doctorate degree in nutrition.

Stephanie Scheurich is Group Manager for the WHCA Group Retrospective Rating Program (GRRP). She earned her bachelor's degree in Sociology from Eastern Washington University and has worked in industrial insurance for over 11 years. She started her career in 2006 as a claims manager at L&I and left in 2011 to advocate for employers. In her current position at Employer Resources Northwest, she is responsible for analyzing the financial performance of employers in the WHCA retro group and providing workers' compensation education and training. She is also a liaison between employers and L&I to improve employers' interactions with the department. Stephanie is passionate about saving employers money in the Washington workers' compensation State Fund program. The founder of *Happy People Win*, a wellness training and speaking firm, Jean has published two books—"Learning to Run Wild: A Wellness Action Guide" and her newest release "Need Change? Customer Service Tips to Help You (Happily) Grow from Good to Great"—the latter of which will be the focus of this incredible workshop for leaders and those aspiring to leadership roles.

Jean Steel, born the eldest of five children, spent her formative years in Africa and Asia. That decade on unfamiliar, foreign soil helped her to cultivate the confidence, strength, and resilience many of us work a lifetime to achieve. A born communicator, Jean's many interests developed into her career path. She earned her Master's Degree in Wellness and has been speaking and teaching across the nation for more than 20 years.

Nicholas Stone Nicholas Stone represents health care and long term care providers in litigation matters. He is a graduate of Boston University School of Law & Medicine with an Honors Distinction in Health Law Concentration. Nick has been recognized by *The Best Lawyers in America 2021* and has been named "Ones to Watch" by *Best Lawyers*. Nick joined Lane Powell in 2017 and is currently an associate on the Senior Living and Long Term Care team.

Sarah Swale is a partner at Jensen Morse Baker PLLC, where she focuses her practice on employment litigation. Sarah has extensive experience litigating, mediating, and resolving claims of discrimination, harassment, wrongful termination, and failure to accommodate. She has obtained defense verdicts at

summary judgment and trial in both ERISA and other employment-related claims. Sarah has also assisted clients through hundreds of agency charges and audits nationwide on federal, state, and local levels. Sarah also takes a proactive approach to compliance by working closely with clients to develop policies and practices tailored to the client's business needs, working collaboratively with clients to resolve workplace issues in the moment, and providing training to managers and staff dealing with employment issues on the front lines. Sarah is also a recognized national presenter on topics ranging from complex wage and hour issues to social media and privacy in the workplace.

Thank you to our sponsors!

