



LEAD

Leadership
Excellence
Administration
Development

Assisted Living **EXECUTIVE** Training Program

April 11-14 and 18-20, 2023
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 live in a series of meetings on seven different days. The entire program is offered via Zoom and will include 28 hours of interactive presentation allowing for Q&A.

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 find value in this Washington-specific training program.

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 optional recorded webinars that participants can access at any time. No additional CEUs are awarded for the recordings 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

The LEAD course is approved for 28 hours of continuing education credits (CEUs) for assisted living professionals from the Department of Social and Health Services.

CLASS SCHEDULE

The LEAD Executive Training Program requires that participants engage in each session via video and audio to complete the course. Participants will need a quiet place without interruption to allow for small group activities and discussion. 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).

Zoom Session Schedule

April 11	9-11 am
April 11	1-3 pm
April 12	9-11 am
April 12	1-3 pm
April 13	9-11 am
April 13	1-3 pm
April 14	9-11 am
April 14	1-3 pm
April 18	9-11 am
April 18	1-3 pm
April 19	9-11 am
April 19	1-3 pm
April 20	9-11 am
April 20	1-3 pm

Technical Requirements for Participants

- 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 training component for administrator qualifications in assisted living and is state-specific for Washington.

PROVISOS

- All sessions will start on time; please be punctual.
- All participants need to have laptop or desktop computer with a camera and microphone.
- 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.

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 recorded webinars to enhance experience, access to presenters for question-and-answer sessions, and 28 continuing education units.

WHCA Member	\$800 per person
NonMember	\$1,600 per person

REGISTER NOW!

Attendance is limited so participants may benefit from interactive discussion and small group activities. Reserve your spot today!

CANCELLATION POLICY

Cancellations made in writing on or before April 4, will incur a \$50 cancellation fee per registered attendee. No refunds will be issued for cancellations received after April 4.

COURSE ENHANCEMENT RECORDED WEBINARS

The LEAD Assisted Living Executive Training Program is enhanced by four recorded webinars that are two hours each and 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 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 achieve them and 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. 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, your mission, vision, and core values rather than on feelings, friendships, and confrontation avoidance. 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 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

COURSE OUTLINE

April 11 | 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
- Resident Rights

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April 11 | 1-3 pm

- Surrogate Decision Makers
- Advance Directives
- POLST
- Death with Dignity Act
- Services in Assisted Living
- Medicaid Contracts
- Additional Care Options
- Nonresident Individuals
- Policies and Procedures
- Disaster, Emergency Preparedness

April 12 | 9-11 am

- Intermittent Nursing Services
- 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

April 12 | 1-3 pm

- 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

around budget development, accounting practices, financial reporting, and measures. Guidance on how to read financial statements and measure operational margins, cash in 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. Regarding staffing, a review of payroll practices and staffing measures and ratio will be provided. Learn how to 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. Regarding 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. Regarding 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 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.

April 13 | 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

April 13 | 1-3 pm

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

April 14 | 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

April 14 | 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 workers' 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

April 18 | 9-11 am

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

April 18 | 1-3 pm

- Abuse/Neglect
- Mandatory Reporting Investigations

April 19 | 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"

April 19 | 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

April 20 | 9-11 am

- Washington State Licensing Inspection Process
- Department of Social and Health Services - Divisions and Interaction with Assisted Living

April 20 | 1-3 pm

- Post-inspection process
 - Plan of correction
 - DSHS Enforcement
 - Informal Dispute Resolution
 - Appeals of State Citations and Fines

COURSE FACULTY

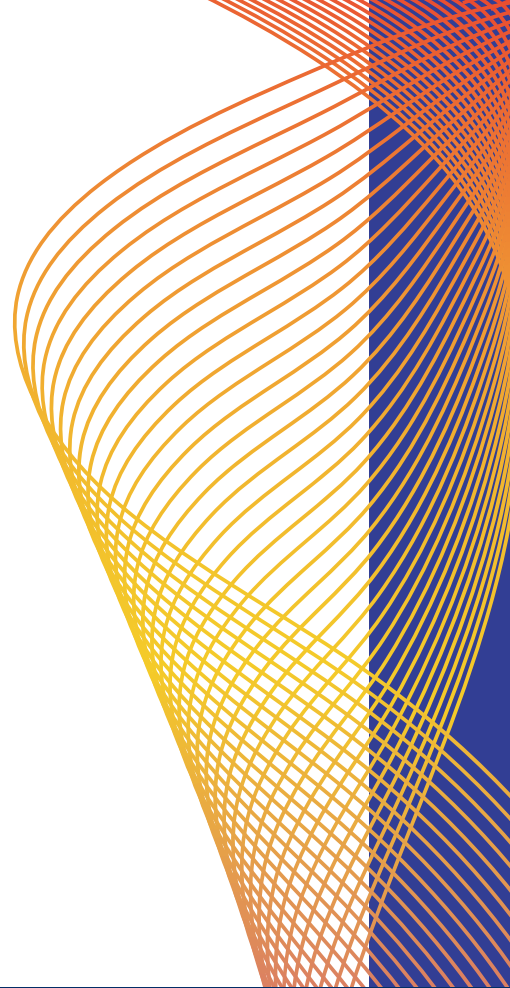
Elena Madrid, RN, BSN is the Executive Vice President for Regulatory Affairs for Washington Health Care Association (WHCA). She supports WHCA members by providing answers and insight to regulatory questions and expectations. Elena's long and focused background in survey and enforcement as a surveyor 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.

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.

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.



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