

Project Summary

Over the past eleven (11) months I have successfully created and managed a work group comprised of In-Home Services caregivers. The work group meets once a month with the purpose of finding new and innovative ways to better serve our clients while empowering our caregivers so that they feel appreciated, respected, and listened to. The work group, which was named the *In-Home Services Visioning Team* (VT), has been responsible for bringing about tremendous change in the way our program operates and how we serve our clients and staff.

Benefits of the Project

Below are some of the accomplishments that have come from the In-Home Services Visioning Team in the past eleven months:

- Software - IHS Visioning Team members voiced the need for new software that would allow them access to their schedules and client Service Plans anywhere they may be. This concern led to the evaluation and implementation of a new software that would better meet the caregivers needs. The VT members were the first to review the proposed software, ClearCare, before it was ever purchased so that they could evaluate its offerings and give their input.
- In-service/Trainings - VT members voiced the need for more training as well as instant access to education when needed. This feedback led to the purchasing of aQuire training. aQuire training modules are now assigned every other month, however caregivers can access training and education videos when needed through their personal computers. The VT also assisted in choosing speakers to come and present such as Serenity Hospice, Cascade Employee Assistance Program, and our Director, Amy Brown.
- Referral Cards - VT members wanted a business style card they could hand out when on campus to help stir up clients as well as put their name out into the community. Referral cards were made up and are now in use.
- New Hire Training - VT members expressed that new hire training was too overwhelming with not enough time to sit and review the information given. They also wanted shadowing time. This feedback led to a system change in which new hires now review policies and procedures prior to meeting with the admin team so that they can have questions prepared. IHS now also has new hires go through aQuire training for medication training so they can go at their own pace and do not have to attend a 4-5 hour training with the RN.
- General Feedback - VT members have given valuable feedback on many topics over the last year, one being communication. It was through the VT that the concern was raised regarding the fact that too many changes had been implemented in a very short period of time and this was very upsetting to the staff. This concern was brought up to the admin team so that they could be more

mindful when implementing new policies, procedures, software, trainings, and so on.

While the VT has made numerous improvements to the IHS program which benefit the organization, the biggest improvement has been staff empowerment. With time being specifically carved out and dedicated once a month for the sole purpose of bringing staff together to find out what is working, what is not, and ask for their feedback, the caregivers now have a real voice in the work they do. The VT aims to be transparent, open, honest, and willing to take members' ideas and implement them whenever possible.

Stakeholders:

- Leadership Team - Marvin Kaiser, Diane Hood, and Sr. Roswitha Frawley provided me with the opportunity and funding to participate in the Leadership Academy. Without their investment my project would not have been a success.
- Director of In-Home Services - Amy Brown gave her full support to this project and made herself available to attend meetings, answer caregivers questions, and implement new ideas.
- In-Home Services Caregivers - Without the time, dedication, and innovation of the VT members no new ideas, solutions, or progress would have been possible.
- Staffing Manager - Anetta Lancaster scheduled all of the VT meetings and rearranged caregiver schedules and assignments so that they could attend meetings.
- In-Home Services RN - The RN stepped in when needed to cover my other functions and duties while I was in the VT meetings.
- Executive Assistant - Stacy Sharma scheduled and coordinated all of our meeting spaces so that we always had a place to hold our gatherings.
- Catering Coordinator - Alison Gilmore did a superb job of providing tasty refreshments for our meetings.
- Mentor - Without the encouragement and guidance from Marybeth Jones I would not have had the focus and support needed to carry out this project.
- Leading Age Oregon Leadership Academy - Bill Zip, Margaret Cervenka, Lynn Szender, and Mark Diller all invested their time, knowledge, and personal inspirations to ensure that I grew as a leader and as an individual. Without the Leadership Academy I would not be the leader I am today.

Challenges

The first challenge I faced was time. It was very difficult to carve out time each month to carefully plan agendas, coordinate with caregivers schedules, find meeting spaces, order refreshments, and so on. It became apparent very early on that I needed to

schedule, and dedicate, specific time to this project if I wanted it to be successful. I found that if I just put tasks on my to-do list they would fall to the back burner and then it would be the day before a meeting and I would frantically be trying to catch up. I now have a system where I collect meeting ideas and topics over the first half of the month, and then a week before the scheduled meeting I plan time to gather all of my notes and prepare my agenda so that the information presented is timely and purposeful.

The second challenge I came across was participation. While the vast majority of caregivers on the team were energetic and excited to attend meetings, there was always one or two who were checked out. It was an excellent learning experience for me in that I had to hold difficult conversations with individuals and ask the question, “is your heart in this or not.” By having the tough conversations it helped to either weed people out who were holding the group back, or it gave the individual a chance to make a change and show up ready to participate. I noticed that by removing some members it made a very positive impact on the group. I quickly learned what kinds of people you do, and don’t, want on a team.

My last challenge was implementation. When caregivers came to meetings they always had wonderful suggestions and ideas of ways we could improve our systems. Their frustrations came when their proposals took longer than expected to implement. This made them feel as though they were not being listened to or taken seriously. This was another great learning curve for me in the way of communication. I had to frequently explain why a project may be taking longer than expected, or for that matter, why a project would not be able to be implemented. Once we had all members on the same page and they understood that their comments, feedback, opinions, ideas and suggestions were taken seriously and were being followed up on, we then began creating trust, and trust lead to a robust team.

Crucial Leadership Behaviors

The three leadership behaviors I found to be most crucial for the successful completion of my project were as follows:

1. Challenge People to try New Approaches

When our group first started meeting it was apparent that the caregivers did not feel empowered or that they had a voice in the work they did. It took time for me to “warm the soil” and build trust among the group to where new ideas were welcomed and tested. Some members were scared of change and did not want to try new approaches or switch systems. It took determination and patience on my part to ever so carefully encourage people to seek out new systems, approaches, and solutions. Over time the group found that trying new ideas was not as scary as they first thought and actually allowed them to test out and learn what worked best for them and their clients. Without trying new approaches the accomplishments the group has made would never have come to fruition.

2. Speak with Conviction About the Meaning of Work

Throughout the course of my project I realized how important it is for people to know *why* they are doing something. Be it a simple task, or a large project, the caregivers needed to know that what they were doing was important and their jobs made a direct impact on their client's quality of life. I tried to make it a point at every meeting to remind the caregivers that our In-Home Services program was created to meet the needs of those we serve. Our caregivers need to be reminded that they play a vital role in assisting people so that they can live their lives to the fullest. Some tasks may seem trivial, but in the big picture they are still adding to the client's wellbeing. Once people had the answer to "why," they were more productive and passionate in carrying out their work.

3. Support Decisions Other People Make

This was one of the more challenging leadership behaviors for me. There were times that I did not necessarily agree with a decision the group made, however I understood that in order for them to take ownership in their work, and in the team, I had to allow and support their ideas. I am a very hands on person so it can be difficult for me to let go and delegate. I found that by supporting others decisions I put the ball back in their court and allowed them to lead - and they did, which made my job so much easier. People want to have the freedom to make their own choices and not always be told how to do something. While this was a difficult behavior for me to learn, it made one of the biggest impacts on the caregivers.

Continued Leadership Development

My goal at this time is to carry on my leadership project into the upcoming year. My aim is that within the next several months one of the caregivers will begin leading and facilitating the group. I would like to see the caregivers take more ownership of the VT and I hope that by stepping down it will allow someone new to step into a position of leadership.

In addition to coordinating the VT, I will also serve as a mentor to several students in the 2013-2014 Leadership Academy. I anticipate this new role will help to strengthen and challenge my leadership skills over the next year.

I plan to continue serving on the Clackamas County Area on Aging Services Committee, and I would like to become more involved with Leading Age Oregon, specifically with their political advocacy.