7/5/05

cc: S Cann
A. Herman
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PIONEER INSTITUTE

CHALLENGING
INTENSE
INSPIRATIONAL
REJUVENATING
MOTIVATING
STIMULATING
EDUCATIONAL
MOVING
ENLIGHTENING
TRANSFORMATIVE
SUPPORTIVE
POWERFUL
LIFE-CHANGING
SKILL BUILDING
SPIRITUAL
CREATIVE
UPLIFTING
INTERACTIVE
HEARTENING
ROUSING
EXPERIENTIAL
ENRICHING
CHALLENGING
ENCOURAGING

An in-depth educational offering of the Pioneer Network — revolutionizing the culture of aging for the 21st century

PORTLAND, OREGON: JULY 12-13 ◆ CHICAGO, ILLINOIS: AUGUST 1-2 ◆ TARRYTOWN, NEW YORK: SEPTEMBER 12-13 ◆ DENVER, COLORADO: OCTOBER 27-28

PIONEER INSTITUTE

welcome

The Pioneer Network is proud to offer the new Pioneer Institute as a means to meet the rapidly growing need for in-depth information and tools related to culture change in long term care and aging. Across the nation, culture change has created a buzz. Many nursing homes and other agencies serving elders have begun initiating changes grounded in the Pioneer Network's person-directed values that underlie culture change.

The culture change movement is now at a pivotal point. With an increasing number of stakeholders joining the movement, we are now inches—not miles— away from having long term care organizations in every state in our nation that are substantially engaged in this effort. This Institute has been designed to provide professional study opportunities to help individuals and organizations that have committed to culture change deepen and advance their efforts.

As the executive director of the Pioneer Network, I have spent much of this past year meeting with my colleagues in other organizations that support the long term care community. We are excited with the strategic relationships developing amongst organizations such as the American Association of Homes and Services for the Aging (AAHSA), the American Health Care Association (AHCA), Quality Improvement Organizations (QIOs), the Direct Care Alliance (DCA), the National Citizen's Coalition for Nursing Home Reform (NCCNHR) and the American College of Health Care Administrators (ACHCA), to name just a few. With all of us working together to improve the lives of elders and those who work with them, deep system change is truly possible.

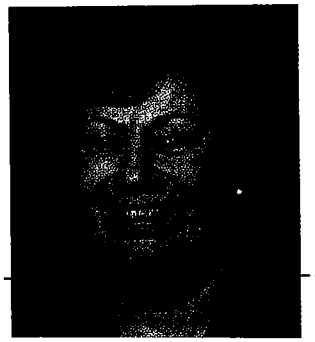
The Pioneer Network is ready to provide intermediate and advanced training opportunities that build and deepen the information disseminated at industry conferences and workshops. We have selected a core faculty for the Institute with first-hand experience in implementing culture change. Our faculty will offer professional content designed to respond to educational, intellectual, social, ethical, and physical dimensions of culture change.

We welcome participants who want to be actively engaged in their own learning, who will engage in sharing their own knowledge and expertise with others, and who seek to advance their own personal and professional growth. The faculty and I look forward to sharing this learning experience with you.

Sincerely,

Rose Marie Fagan

Rose Marie Fagan



about the Pioneer Institute

Statement of Mission

The Pioneer Institute offers a person-directed professional study opportunity to individuals and organizations committed to creating a culture of aging that is life affirming, satisfying, humane, and meaningful. The Institute's academic program is grounded in the values of the Pioneer Network, which seeks to restore control to elders and those who work closest with them.

Audience

In general, the audience for the Pioneer Institute includes CEOs, CFOs, DONs, administrators, activities professionals, social workers, department heads, nurses, direct care workers and any other professionals who are championing culture change values and practices through their work. The specific audience for each professional study pathway is identified in the course descriptions.

We encourage organizations to send teams that represent both formal and informal leaders in your change process. Team participation will create a greater circle of support in your workplaces while enhancing opportunities to bring the full scope of Institute education back to the organization.

This Institute has been designed to bring additional skills and tools to any organization involved in the workforce retention collaborative or person-directed culture pilot projects supported by the Quality Improvement Organizations and to organizations who have committed to AAHSA and AHCA's quality first initiative. In addition, consultants, educators of culture change theory and practice, advocates and regulators will find this Institute valuable.

Professional Study Pathways

Participants can choose their area of study and exploration from the following five pathways:

1| Leading Culture Change: What Does it Take?

2| Becoming a Learning Organization: Transformational Training Techniques

3| Championing the Elders: Creating Communities that Make Life Worth Living

4| The Culture Change Journey: Getting it Started and Keeping it Going

5| Changing the System: A Multi-Stakeholder Approach to Action

Choosing a Pathway

Participants should review the course descriptions and learning objectives for each of the five pathways and select the topic that most meets their current interests and professional development needs. Because the intent is to explore a topic deeply, participants will stay with their selected pathway throughout the entire Institute. Faculty has selected some common process and content approaches to ensure consistency of message, regardless of pathway. Log onto www.PioneerNetwork.net for additional detail regarding course curriculum.

Leading Culture Change: What Does It Take?

pathway 1

Course Description

Leadership means influencing others to do the right thing. This pathway provides a unique opportunity for personal awareness and growth as a transformational leader. Learn how to apply your own leadership to each stage of the culture change process while at the same time empowering elders and staff to grow and serve as leaders. Curriculum includes recommended actions to employ in various stages of the culture change journey, the progression of environmental and business factors leaders must face, and a private self evaluation of your own strengths and needs as a leader.

Audience

This session is for leaders in all levels and positions who are eager to strengthen their ability to effect transformation.

Objectives

Participants will be able to:

- Define Transformational Leadership
- Identify three reasons why change is inevitable
- Understand and be able to describe Change Processes, including: Personal, Leadership, Organizational, and Environmental
- Identify where they are in embracing leadership and growing it in themselves and others
- Describe Servant Leadership and identify the competencies involved
- Detail the factors of a Learning Climate, necessary to grow leadership in others
- List the business benefits of growing leadership deep in the organization
- Differentiate between hierarchical leadership and peer leadership by discussing the values and outcomes of each
- Map out a basic Action Plan to grow leadership, whether in themselves or within their organization.

Faculty

Steve Shields
BSW, CEO,
Meadowlark Hills,
Manhattan, Kansas

LaVrene Norton
MSW, Executive
Leader, Action Pact,
Inc., Milwaukee,
Wisconsin

Becoming a Learning Organization: Transformational Training Techniques

Pathway 2

Course Description

The process of transforming into a learning organization is dependent upon an ample amount of quality learning opportunities for all involved. The challenge to the trainers/educators is magnified by the need for this training to result in shifts in inner values that affect changes in personal behavior. This professional study pathway will build skills and offer tools to individuals whose roles require them both to teach culture change values and practices as a well as facilitate the growth of new culture. Culture change content will be used to model what we are teaching all of which is based upon adult learner principles.

Audience

Individuals, regardless of role or employer, who are engaged in facilitating learning sessions related to culture change. Experienced educators/trainers seeking growth opportunities in content and training techniques will benefit from this experience as well as those who are newer to teaching.

Objectives

Participants will be able to:

- Connect comfortably with other participants
- Reflect on the fact that making connections is vital to becoming a learning organization
- Conduct a personal and organizational learning needs assessment
- Identify barriers and drivers to creating a learning organization
- List six learning concepts
- Describe a variety of training techniques
- State the value of affecting Knowledge, Skills, and Attitude (KSA)
- Explain the concepts of homelessness, home, personhood, and community
- Understand the need for a summary and memorable closing
- Experience planning, conducting and evaluating an educational session

Faculty

Megan Hannan
BA, MS, Senior Change Leader, Action Pact, Inc.

Glen Blacklock
BA, MS, Administrator, Big Meadows

Joe Angelleli
PhD, Associate Professor, Pennsylvania State University

Championing the Elders: Creating Communities that Make Life Worth Living

pathway 3

Course Description

Pioneer Network values state that *community is the antidote to institutionalization.* Attendees will participate in a learning community designed to build awareness, skills, and knowledge on two levels: the personal transformation to a community-builder, and the organizational transformation to an elder-centered community. The primary learning goal is to facilitate the development of communities in which elders thrive and provide the antidote to negative impacts of institutionalization on body, mind and spirit. Routine benchmarks of elder-centered communities include: choice, meaning, joy, mourning, learning, growth, voice, connection to one another and the wider world, hope for the future and participation in whatever is significant to elders.

Audience

This pathway is designed for all individuals who want to see the vision of thriving elder-directed communities become a reality. Elders, CEOs, administrators, DONs, activity professionals, social workers, nurses, direct-care workers, food service personnel, environmental services personnel, advocates, consultants, educators and regulators are encouraged to attend.

Objectives

Participants will be able to:

- Identify the rituals and routines of daily life that make a long term care environment a home
- Transform personal and organizational practices to be consistent with regenerative community values
- Explain the structure and design of a ritualized community meeting that enables elders to thrive and be empowered
- Explain the role and employ the basic skills of the community developer in organizational transformation
- Develop a strategy to build community in your own workplace
- Use tools to establish a ritualized and frequent Council of Elders as the driving force of a resident-centered community
- Implement a preliminary plan to recruit others to provide a support system for elder community development
- Integrate the role of champion of an empowered resident-centered community into all of one's daily tasks

Faculty

Barry Barkan
BA, Co-Director,
Live Oak Institute

Debora Barkan
BA, Co-Director,
Live Oak Institute

The Culture Change Journey: Getting it Started and Keeping it Going

pathway 4

Course Description

"OK....culture change—great idea...but what is it, how do you do this, and what should we watch out for in the change process?" This professional study pathway will answer these important questions while exploring each step of the change process using curriculum intended to be repeated by participants in their own workplaces. Day One of the Pathway is dedicated to learning how to transform the workplace culture while Day Two emphasizes how to implement person-directed practices that restore quality of life to elders and individuals living with disabilities. Participants will complete an assessment of strengths and opportunities in their own work environments and design a plan for deepening cultural transformation in their organizations.

Audience

This pathway will be useful to formal and informal leaders that are on the journey towards culture change and are seeking coaching, tools, and knowledge regarding *HOW* to keep the process evolving. Administrators, CEOs, DONs, Department Heads, Direct-Care Workers, any staff member championing culture change, Consultants, Educators and Advocates are encouraged to attend.

Objectives

Participants will be able to:

- Define culture change as it applies to long term care, and explain the differences between incremental change and deep system change using specific examples
- Explain how to establish and sustain organizational readiness for change
- Explain how to create high involvement from staff, residents and families in the change process
- Employ interventions for managing resistance, improving relationships, and building teams
- Identify multiple interventions to transform workplace culture
- Explain steps to create a shared mission, vision and values statement
- Assess key components of organizational culture for strengths and weaknesses.
- Teach components of this pathway in their own workplace
- Identify multiple person-directed practices to improve quality of care and quality of life.
- Conduct learning circles
- Establish a work plan that outlines next steps to align person-directed values with daily operational practices in their own organization

Faculty

Susan Misiorski
BSN, Organizational Culture Change Specialist, Paraprofessional Healthcare Institute

Joanne Rader
RN, MN, FAAN, Associate Professor, Oregon Health Sciences University and Rader Consulting

Changing the System: A Multi-Stakeholder Approach to Action

pathway 5

Course Description

In order for culture change efforts to be successful, change is required both internally and externally to individuals and organizations that serve and support elders. This professional study pathway will offer participants tools to impact the external systems that surround long term care agencies of all types. The faculty will lead interactive sessions designed to stimulate new ways of thinking about professional relationships, networking and public policy activities that will support the success of multi-stakeholder coalitions at any stage of development.

Audience

This pathway will be valuable to members of established culture change coalitions, individuals interested in starting a coalition, long term care professionals interested in learning how to influence public policy that directly impacts their work and lives, advocates, educators, public policy makers, regulators, consumers, and families of consumers.

Objectives

Participants will be able to:

- Discuss components of relationship building and networking as precursors to developing and sustaining effective multi-stakeholder coalitions
- Recognize key stakeholders in the broader aging system that influence the culture of aging and state/national public policy
- Acknowledge differing stakeholder roles and perspectives and how this diversity can be an asset
- Obtain hands-on strategies for developing a shared agenda amongst diverse individuals
- Engage in a process of personal exploration and growth that will improve effectiveness as a coalition member and change agent
- Explain the Pioneer Network's definition of culture change, coalitions and coalition building
- Identify ways to bring the voices of staff, elders and their families into the coalition

Faculty

Mary Anne Kelly
BA, MPA, Executive Director Southwestern Pennsylvania Partnership for Aging and Adjunct Professor University of Pittsburgh School of Social Work

Heather Mayger
BS, Carnegie Mellon University Graduate Student

Building the Case for culture change

All participants will attend the following session on building the case for culture change on Day 2, from 11:45 a.m.to 1:45 p.m.:

Session Description

Research-based evidence clearly indicates that embarking on the journey of organizational culture change is not only the "right" thing to do, it makes perfect business sense as well. Learn about a variety of research studies all pointing toward a solid business and clinical case for building a person-directed culture in long term care facilities. In addition, this session will highlight the current bestseller "Good to Great" by Jim Collins. This book is based upon a research study that identifies the universal principles embraced by eleven organizations that made the transformation from "Good to Great." Discussion will include the critical components from the book related to leadership and organizational culture change and their applicability to long-term care.

Audience

This session will be useful to formal and informal leaders that are on the journey, or are preparing to begin the journey, towards culture change and are seeking empirical evidence to validate or support their decision.

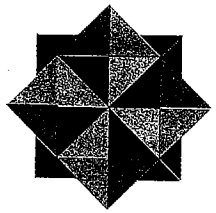
Objectives

Participants will be able to:

- Explain the results of numerous research studies that point to the need to change organizational cultures away from the institutional model
- Understand the business and clinical case for embarking on organizational culture change initiatives
- Discover what the "Good to Great" companies did on a consistent basis to retain staff, collect data, improve business results and achieve sustained excellence

Faculty

David J. Farrell
MSW, NHA,
Project Manager,
Quality Partners of
Rhode Island

PIONEER  INSTITUTE

Choosing a Location

The Pioneer Institute is being offered in four locations across the nation. Participants are encouraged to attend the Institute at whichever location is of most interest to them. Registrations by location will be accepted on a first come, first served basis. The Pioneer Institute will be offered in the following locations:

July 12-13, 2005 (Tuesday/Wednesday)	**Portland, Oregon** **Red Lion Hotel on the River** (formerly Doubletree Jantzen Beach)
August 1-2, 2005 (Monday/Tuesday)	**Chicago, Illinois (St. Charles)** **Pheasant Run Resort**
September 12-13, 2005 (Monday/Tuesday)	**Tarrytown, New York** **Westchester Marriott**
October 27-28 (Thursday/Friday)	**Denver, Colorado** **Inverness Resort**

Continuing Education Credits

For Administrators, application has been made with the National Accreditation Board for 13 hours. All other disciplines will receive a certificate for continuing education credits.

Comfort

The recommended dress code for the Pioneer Institute is business casual. However, due to the potential challenges of unpredictable weather and hotel heating and cooling, it is suggested that you bring a sweater or light jacket.

Pioneer Institute Daily Schedule

Day 1

8:30–9:15 a.m.	Morning Community Learning Session
9:15–9:45 a.m.	Break
9:45 a.m.–11:30 a.m.	Pathway Exploration
11:30 a.m.–12:45 p.m.	Lunch
12:45 p.m.–2:30 p.m.	Pathway Exploration
2:30–3:00 p.m.	Break
3:00–5:00 p.m.	Pathway Exploration
5:00–7:00 p.m.	Dinner on own
7:00–9:00 p.m.	Evening Community Learning Session

Day 2

8:30–9:45 a.m.	Pathway Exploration
9:45–10:15 a.m.	Break
10:15–11:45 a.m.	Pathway Exploration
11:45 a.m.–1:45 p.m.	Lunch and Community Meeting
2:00–3:15 p.m.	Pathway Exploration
3:15–3:30 p.m.	Break
3:30–4:30 p.m.	Community Learning Session/Closing

Tuition Schedule

Pioneer Institute tuition can be paid by a check made payable to "Pioneer Network" or by credit card on this form — sorry, no phone registrations. To encourage teams to attend the Pioneer Institute, group discounts are offered. Please use the fee schedule below to determine the amount of tuition due.

Number of persons	Tuition
1	$650
2-3	$575 per person
4 or more	$525 per person

Tuition includes continuing education credits for administrators, course materials and lunch both days.

Please mail this registration form:
Pioneer Network
PO Box 18648
Rochester, New York 14618

Cancellation Fees

Necessary cancellations 30 days prior to the event will receive a full refund, less a $50 administrative fee. For cancellations made within 30 days of the event no refunds will be issued. Refunds will be issued after the Pioneer Institute. Participant and location substitutions may be made, without penalty, any time prior to the conference.

Scholarships

A limited number of scholarships are available for each location. For information, please visit www.PioneerNetwork.net

Hotel

Conference tuition does not include hotel accommodations. For hotel and city information, please visit www.PioneerNetwork.net.

For registration questions, contact
JoAnn Arcarese at (585) 271-7570 or
Joann.Arcarese@PioneerNetwork.net.

PIONEER INSTITUTE

2005 REGISTRATION FORM

Please complete one form for each individual. This form may be duplicated for other individual registrations. Please type or print clearly.

VENUE: Check **ONE**

Date	Institute Location
❍ July 12-13, 2005	Portland, Oregon
❍ August 1-2, 2005	Chicago, Illinois
❍ September 12-13, 2005	Tarrytown, New York
❍ October 27-28, 2005	Denver, Colorado

PATHWAY: Space is limited, so please indicate your first and second pathway choices by writing a "1" or "2" next to your choices.

_____ Leading Culture Change: What Does It Take?
_____ Becoming a Learning Organization: Transformational Training Techniques
_____ Championing the Elders: Creating Communities that Make Life Worth Living
_____ The Culture Change Journey: Getting It Started and Keeping It Going
_____ Changing the System: A Multi-Stakeholder Approach to Action

NAME

NAME FOR INSTITUTE BADGE

TITLE

ORGANIZATION/AFFILIATION

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CITY STATE ZIP

TELEPHONE FAX

E-MAIL

Payment Method: ❍ Check ❍ Visa ❍ MasterCard

CREDIT CARD NUMBER EXPIRATION DATE

SIGNATURE

❍ Please check here if this is your first Pioneer Network event.

Special needs (please specify)

My employer is:
(check one)
❍ a not-for-profit home
❍ a for-profit home
❍ a government agency
❍ other (please specify)

The Pioneer Network

The Pioneer Network is an organization that serves the grass roots movement to change and transform the culture of aging in America. It is shaped and sustained by the work, interest, and support of a broad community of elders and those who work with them.

It is an inclusive movement, gathering and sharing the best work in the field. It is not a membership organization. There are no card-carrying pioneers, no formal designation for a facility that is on the path to culture change, and no single prescriptive method. For more information, visit www.PioneerNetwork.net.

With thanks to our national sponsors: The Professional Education Center of the Jewish Home & Hospital Lifecare System and The Commonwealth Fund.

Get serious about culture change.

Attend the Pioneer Institute.

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