

## ANCOR Links

February 4, 2013

### Columns

## CEO Perspective: How Do We Go From Here?

*Renee L. Pietrangelo, PhD*

Business transformation is essential for survival. Success is found in adapting traditional business to fit new and growing markets.



Sooner or later, every organization will need to transform itself in response to market shifts, new technologies and changes in the funding and regulatory environment. How to do it persists as the essential question. What is the most sustainable approach? At the recent ANCOR State Provider Association Executives Forum, held in conjunction with our Government Relations retreat, Forum Chair Mark Davis shared a presentation on systems reform that raised the provocative question of community service providers' path in the future---extinction or growth. He noted the critical importance of focusing on customers rather than service lines, and our need to determine what business we're in. Mark cited the fatal decision the railroad industry made in not realizing it was in the transportation business, not the railroad business and the near-fatal decision Hollywood made in not realizing it was in the entertainment business rather than the movie business.

Harvard Business Review authors Gilbert, Eyring and Foster (December 2012) propose a two-pronged approach that's both more practical to implement and more sustainable. They suggest that transformation needs to be two different efforts happening in parallel. The first should reposition the core (legacy) business, adapting the current business model to the altered marketplace. The second should build for the future, creating a separate and distinct business to develop the innovations that will underpin future growth. We've already seen this happen amongst

ANCOR member organizations that have started up separate companies, predominately around the remote monitoring service delivery model, but including others.

The key to making this work, according to the authors, is establishing a new organizational process called a "capabilities exchange" through which parallel efforts can share select resources without changing the mission or operations of either. Launching a successful start-up inside a threatened legacy business takes creativity and grit. It requires a structure that allows the two transformations to live together and share their strengths. That's the role of the capabilities exchange. The authors go on to explain the five-step process that must underpin the exchange.

- Establish leadership
- Identify resources the two can or need to share
- Create exchange teams
- Protect boundaries
- Scale up and promote the new business

Dividing the effort allows leaders to save as much of the legacy business as feasible, maintaining the strongest competitive advantages, while also granting the growth business the time it needs to experiment and get established. These strategies are certainly not a magic bullet. Costs must still be cut and efficiencies aggressively pursued. Each transformation must operate as if the future of the organization depended on it alone.

*Author LINK: Renee Pietrangelo is CEO of ANCOR. She can be reached at [rpietrangelo@ancor.org](mailto:rpietrangelo@ancor.org).*



## Why Speeches Matter - President Obama Takes Medicaid "Off the Table"

Barbara Merrill

Political speeches reveal coming policies. Paying attention to them gives us an edge and direction for action.



Public remarks by our top elected officials reveal at least two things: where they believe they are most in sync with the beliefs of the electorate, and where they are least likely to compromise. That's why it was so noteworthy last summer when former President Clinton, speaking at the Democratic National Convention, cited the needs of parents of children with disabilities as a central reason why Medicaid should not be cut recklessly. Clinton's passion and ability to rouse the Democratic Party base on this topic was appreciated and endorsed by his audience, most notably President Obama. Since the Clinton speech President Obama has consistently included references to people with disabilities in his litany of Medicaid health care priorities, culminating in the January 31st announcement by a top White House advisor that the President was backing away from broad cuts to Medicaid.

Speaking at the Families USA conference last Thursday Gene Sperling, Director of the National Economic Council, stated "other than the most minimal, smart, efficiency type of measure, Medicaid savings, Medicaid cuts for this president, for this administration are not on the table." While the broader decision was clearly directly related to the White House's need for the nation's governors to know that the Medicaid rug will not be pulled out from under them as they

consider expanding eligibility under the PPACA, the President's consistent references to children with disabilities demonstrates his strong support for federal funding for disability services.

The most significant reference to his support for disability services came during his second inaugural speech, when the President, taking on Mitt Romney's infamous 47% remark, doubled down.

*We, the people, still believe that every citizen deserves a basic measure of security and dignity. We must make the hard choices to reduce the cost of health care and the size of our deficit. But we reject the belief that America must choose between caring for the generation that built this country and investing in the generation that will build its future. For we remember the lessons of our past, when twilight years were spent in poverty, and parents of a child with a disability had nowhere to turn. We do not believe that in this country, freedom is reserved for the lucky, or happiness for the few. We recognize that no matter how responsibly we live our lives, any one of us, at any time, may face a job loss, or a sudden illness, or a home swept away in a terrible storm. The commitments we make to each other – through Medicare, and Medicaid, and Social Security – these things do not sap our initiative; they strengthen us. They do not make us a nation of takers; they free us to take the risks that make this country great.*

Significantly, the President's withdrawal of support of broad cuts to Medicaid, including cuts to provider taxes, demonstrated the power of the direct lobbying and grassroots advocacy by ANCOR members, the American Health Care Association and our Medicaid coalition partners that educated the Administration about the importance of provider taxes for long term supports and services for people with disabilities and seniors. The threat to this source of funding was very real. Provider taxes were considered the low hanging fruit and included in numerous deficit reduction proposals. The Administration's announcement last week marked a significant shift from the president's previous budget proposals and negotiating posture during the Super Committee negotiations of 2011, when he supported cuts to Medicaid that included provider tax cuts and restructuring FMAP for CHIP and Medicaid into a single blended rate.

Do the President's remarks in support of funding for disability services and his withdrawal of broad cuts to Medicaid translate to an automatic get out of jail card, exempting critical funding from harm going forward? No, but it does give us a powerful fulcrum that can magnify all the efforts we make to protect essential funding for the people we serve. Let's find every means to amplify these words. We must marshal our facts, continue to collect personal stories to put faces on Medicaid and repeatedly present this information to the President and Congress. These stories are powerful and make the case that we all matter.

Here's the irony. As many of you know from personal experience, it is still scary to be the parent of a child with a disability contemplating the future. It is still the norm in a great number of states that young people languish on waiting lists for services once they finish high school. These kids, many of whom developed essential employment and community skills in school, are far too often relegated back home. This is a familiar story. Parents all too often forced to leave their own jobs to support their children who are now young adults, all the more ironic when sometimes just a few hours of support would enable that young person to enter the adult work force with dignity.

Now is not the time to relax. The president clearly understands how important Medicaid is for people with disabilities, but he and our members of Congress need our help to ensure that Medicaid not be trimmed in such a way that inadvertently puts even more pressure on state budgets. Commit to collecting several powerful stories now, and send them to me at [bmerrill@ancor.org](mailto:bmerrill@ancor.org). Collect your facts. How many people are on waiting lists in your state or region? Start a petition for parents to sign. Reach out to locally organized sibling networks. Share that information with your Senators and Congressman through [ANCOR's Legislative Action Center](#). Finally, come to Washington in April to meet with your members of Congress during [ANCOR's 2013 Conference](#) in Washington April 28-31. Let's provide the President and the members of Congress with the information they need to protect federal funding for quality supports and services.

Author LINK: Barbara Merrill is ANCOR's Vice President of Public Policy. She can be reached at [bmerrill@ancor.org](mailto:bmerrill@ancor.org).



## State Association View: There is NO Doubt - You are Ready to Lead!

*Diane McComb*

ANCOR members are perfectly positioned to take a leadership role in the upcoming implementation of the Affordable Care Act and the trend towards person-centered care.



We've been on a tumultuous track for years now, with the recession and political uncertainty paralyzing many state governments around the country. Thirty states are still reporting budget deficits as the 2013 legislative sessions get underway. Even those without deficits are operating with less state funding than they had prior to the beginning of the recession four years ago. Only North Dakota boasts a dramatic increase in revenues. Unemployment figures for 2012 ended at 7.8 percent, barely budging from the prior month, though down considerably from two years ago.

At the Federal level there are cliffs and pitfalls at every turn. The elections brought a host of changes within federal and state government and nationally huge uncertainties are looming with regard to entitlement programs that support people with disabilities and their families.

The Affordable Care Act (ACA) is lurching forward and with it opportunities abound as many states expand home and community based services and supports in a myriad of demonstrations heretofore unheard of. The ACA provides those in the field of disabilities a unique platform from which to provide leadership. If one looks closely at what is coming out of CMS, it reflects language and principles with which we are very familiar.

CMS is redesigning the systems supporting people with chronic conditions and emphasizing person-centeredness, individual control, integration of health care and of supports within communities and quality. New systems of care are risk-based, spreading risk across providers and government. States are beginning to buy outcomes more and more, moving away from things like paying for a day of attendance or a doctor visit, opting instead for measuring outcomes achieved by people like getting a job or better health. CMS is also requiring integration and collaboration across systems that work together to create better health and social well-being for people served.

No one understands person centered planning and self-direction as well as those who have worked in the field of disabilities for the last twenty-five years. Just now catching on in the medical and behavioral health world, ANCOR members and state associations are well poised to provide leadership on developing circles of support and other strategies important in implementing a person-centered system. Self-direction provides the same compelling leadership opportunity as CMS moves to hold managed care companies accountable to honoring individual choices and supporting self-directed lives.

Integrated care is discussed in multiple ways including the integration of primary, acute and behavioral health, medical and social supports and primary and long term supports and services. ANCOR members have spent years perfecting the practice of care coordination, even though it may have been called case management, service coordination or service brokerage. While most ANCOR members haven't been subjected to managed care as it is evolving today, agencies have operated under grant and capitated systems for decades. Additionally, agencies have been held accountable to provide for the comprehensive provision of supports and services to people with disabilities without regard to actuarially sound rates setting methodology. As a result of an adherence to person centeredness, agencies generally have provided extensive care coordination in a fully integrated structure despite the lack of dedicated funds to do so. There is probably no other human services system in the country that has operated as the disability network has because it is rooted in advocacy.

Collectively ANCOR members and state associations have much to offer in new ACA partnerships. No other entity understands these concepts in the way the disability community understands them. No doubt there are efforts underway in

your community among hospitals, clinics, physicians and other providers of traditional health care and social services. If you aren't working within those efforts as a partner, you are missing the leadership opportunity of your career. Reach out to those involved and be at the table. ANCOR members and state associations have a huge contribution to make in expertise, developing non-clinical performance measures and care coordination.

This is a time of unprecedented change, constricted resources and political uncertainties. Yet there has never been a time when there was adequate funding. ANCOR members and state associations are the right leaders capable of teaching others on the ACA implementation path

Author LINK: Diane McComb is ANCOR's Liaison to the State Association Executives Forum. She can be reached at [dmccomb@ancor.org](mailto:dmccomb@ancor.org).



## Wage and Hour: DOL Continues Focus on Employee Misclassification

Joni Fritz

Beginning this year, the Department of Labor is teaming up with state governments to ensure correct employee classifications and to collect back wages for employees who were misclassified.



Business models that attempt to change or obscure the employment relationship through the use of independent contractors are not inherently illegal, U.S. Department of Labor officials say, but they may not be used to evade compliance with federal labor law. Although legitimate independent contractors are an important part of the economy, the misclassification of employees presents a serious problem, as these employees often are denied access to critical benefits and protections such as family and medical leave, overtime compensation, minimum wage pay and unemployment insurance to which they are entitled. In addition, misclassification can create economic pressure for law-abiding business owners, who often find it difficult to compete with those who are skirting the law. Employee misclassification also generates substantial losses for state Unemployment Insurance and workers' compensation funds.

The U.S. DOL is entering into Memoranda of Understanding with state government agencies as part of the Department's "Misclassification Initiative." Iowa is the 14th state to enter into such an understanding and did so on January 17. This memorandum will allow Iowa to utilize federal resources that weren't available to the state previously.

Since this initiative began, U.S. DOL has collected \$9.5 million in back wages for more than 11,400 workers where the primary reason for minimum wage or overtime violations was that workers were not treated or classified as

employees, according to Wage Hour officials. This represents an 80 percent increase in back wages and a 50 percent increase in the number of workers receiving back wages following implementation of these agreements.

### 10 States Raise Minimum Wages

Effective January 1, 2013, ten states increased their minimum wages, based on cost-of-living increases or some other factor. Some of these states had postponed increases that should have become effective January 1 of last year. As of now, 19 states and the District of Columbia have minimum wages that are higher than the federal minimum wage of \$7.25 per hour. Twenty-two states have a minimum wage that equals the federal wage, in four states the minimum wage is lower than the federal minimum, and in five states no minimum wage is required.

However, in all states, employees who are not specifically exempt from provisions of the Fair Labor Standards Act must be paid at least the federal minimum wage and at the state rate where that is higher.

Joni Fritz is a Labor Standards Specialist whose guidance is free to ANCOR members and to those who attend a Wage and Hour Workshop or participate in a teleconference she has conducted. Any ANCOR member who wishes to make arrangements for consultation or workshops with Joni must first contact Barbara Merrill, ANCOR Vice President for Public Policy, for a referral at (703)535-785, ext. 103 or [bmerrill@ancor.org](mailto:bmerrill@ancor.org).



## President's Corner: Are You a Leader?

*Dave Toeniskoetter*

Now is the time for ANCOR members to put their leadership expertise into action.



The theme of this issue of LINKS is leadership, so I've been pondering what it means to be a leader in the field of services for people with disabilities. What are the qualities that cause us to recognize an individual as a leader?

### *In my experience...*

*Leaders are restless and energetic.* They bring a high degree of creativity to their work. They are always out in front, pushing the envelope.

*Leaders are engaged with their environment.* They take an active role in shaping the world around them. They are volunteers and "joiners."

*Leaders work for the common good.* They look beyond their own self-interest in order to "give something back" to society.

Wow, that description sounds like most of the folks I've met in ANCOR. I do believe the folks who volunteer for ANCOR (and our sister associations in the states) are the leaders in

shaping the field in which we work.

To borrow a phrase from Charles Dickens, this is both the best of times and the worst of times to be an ANCOR volunteer leader. It's pretty obvious why this is "the worst of times." Since the economy fell apart four years ago everything we do is just plain hard. Providers are hanging on by their fingernails as the system of supports and funding that we painstakingly built is rapidly eroding around us. How can we possibly find the time to volunteer, the energy to engage with our peers and the money to join associations and attend conferences?

So, why is this also "the best of times" to be an ANCOR volunteer leader? Simple. The need and the opportunity are huge at the moment. I believe the odds of experiencing significant changes in Medicaid for people with disabilities are the highest in a generation. In these times the opportunity for **your** vision and **your** ideas to carry the day and contribute to a better service environment is greater than ever. Decisions will be made rapidly and those at the table will have an opportunity to affect the outcomes.

Last month I participated in the ANCOR Government Relations Committee's annual strategic planning retreat. My "takeaways" from that meeting were several. First, managed care is likely to become the norm for Medicaid services for people with disabilities. We can't stop it, but we may have the opportunity to shape it. Second, "just say no" (to funding cuts) is not a feasible stand-alone strategy. Yes, we must work vigorously to protect necessary funding for the people we serve, but we must also come to the table with creative strategies to use government funding more effectively. Third, there are folks within ANCOR, the advocacy community and in government who care deeply about the future of Medicaid for people with disabilities, and who are actively engaged in envisioning new ways to design and fund services. One example of such work is ANCOR's Medicaid Sustainability Project.

If the future of services for people with disabilities is important to you, and you have ideas and energy to share, I hope you will engage as an ANCOR volunteer leader.

*Author LINK: Dave Toeniskoetter is President and CEO of Dungarvin. He can be reached at [dtoeniskoetter@dungarvin.com](mailto:dtoeniskoetter@dungarvin.com).*



## This Month's Focus: Leadership

# Leadership in Executive Transition: One ANCOR Member's Experience

James "Jim" Richardson

When Jim Richardson decided it was time to step down as president of Cedar Lake, he took the opportunity not only to lead his organization in the transition, but to set the stage for its continued success.



It was summer 2007, a time I was celebrating my 30th anniversary as Cedar Lake's President & CEO, when I realized that I had a duty to look ahead to my not-so-soon but nonetheless certain retirement. My recall is that those thoughts probably came to me while sleeping, probably about 4 am, a time when I (and I suspect many of you) tend to have sleep disrupted by the "monkey-chatter" of worry and various thoughts about impending tasks and events.

My early thoughts about retirement and succession planning were a distant and unappealing prospect. Departing my beloved job would mark the end of something that I had real passion and pride about performing and the painful truth be told I also had to face my own vanity, and admit that I defined much of my self-worth by my job. For lack of better explanation, I viewed my retirement and succession planning as something akin to an admission of my demise and the planning of my funeral.

With that view it was no wonder that I did not rush into action, however, this realization was a call to duty that would demand a difficult decision, leadership and action. It was clear; I had to take a proactive role to plan for my retirement and the succession and transition planning that it necessitated.

By the end of 2009 I had explored best practices and found the courage to meet and talk with my board chairmen and senior staff members, discussing with each of them my decision and intent to (gulp!) retire sometime in 2011, after I reached 62. We agreed that succession planning and managing for leader change was critically important. I assured everyone that I would keep them appropriately involved and informed as a transition process was established, acknowledging that the board leaders would have ultimate command of my work and the process and that "timing" considerations would be sensitive to agency interests, not just my own.

In so informing the board chairs and other insiders about my retirement plans and succession planning considerations, I also found a new sense of relief, satisfaction and purpose. Looking back, I feel I fulfilled a key but too-seldom recognized leadership obligation – 'to know when to go.' It seemed to me then, and still seems, that too often good leaders stay too long. I have heard numerous fellow colleagues complain that no one else can do their job; others have admitted that they have no exit strategy or just don't want to give up their job. I think some leaders simply do not embrace it as their responsibility to orchestrate an exit and smooth transition to new agency leadership and that's a serious error of leadership to my thinking.

I feel taking command of the timing, formulating a strategy and orchestrating conditions surrounding my retirement was the right thing to do and the epitome of good leadership! After all, Cedar Lake was not "my" agency. I was just a fully invested long-term leader. Looking back I'm confident that one of my most important legacy functions was to help prepare Cedar Lake for my departure and strongly position the agency so that it was well equipped to continue to flourish under new leadership!

Information about succession planning concepts, strategies and practices are abundant. Fortunately, I discovered a terrific [BoardSource](#) publication entitled *Chief Executive Transitions* that I felt was comprehensive, yet concise and ideally suited for our needs. *Chief Executive Transitions* is an excellent concept resource and technical workbook, and even comes complete with a CD-ROM and practical assessment and survey tools. I provided a copy for key board leaders and senior staff.

Cedar Lake's board leaders enthusiastically embraced *Chief Executive Transitions* and adopted it as a core resource guide and model. The title concept theme of "executive transition" proved powerfully influential and important for us, and our board established an "Executive Transition Committee" instead of a more narrow and traditional "search committee" to govern our executive transition.

Due to my long tenure at Cedar Lake I used roughly a year to prepare the agency in various ways for a top management transition. Informal matter-of-fact conversations with connected parties that included staff, board, volunteers, clients, client families, donors, vendors and government officials to discuss the strong position of the agency and my unspecified but

upcoming retirement were frequent. My goal was to eliminate surprise and instill confidence in organizational stability, staff leadership and the agency's bright prospects.

Blessed with an experienced and superb senior team, various management responsibilities were recast in the year preceding my retirement. In some cases my goal was cross-training, but I also wanted to position and challenge senior staff to further develop and enhance their skills, realizing that further management changes and opportunities were likely once a new president & CEO took command.

These transitional strategies generally worked well. By the time my June 30, 2011 retirement date was officially announced in February 2011, the senior management team was strongly positioned and most everyone connected to Cedar Lake seemed to view my departure date as old and uneventful news.

The role of Cedar Lake board Executive Transition Committee became fully engaged in January 2011 and soon decided to engage a consulting executive search firm to conduct, screen and advise them on the search and selection of a new CEO. An expensive option, a top local firm was selected from among four invited and vetted prominent search firms.

The search firm we engaged used a proven industry process that consisted of finalizing position specifications/candidate qualifications, candidate prospecting, candidate assessment using a "Predictive Index" analysis, candidate questionnaire/screening, interview support and reference checking. The intense work of the executive search firm work was largely executed over a three-month period, and with my role limited to one of administrative support.

### Epilogue

So how did things turn out? Our executive transition experience, while undoubtedly imperfect, worked well and resulted in good and successful outcomes. Now twenty months later, I'm into a fun and comfortable new phase of my life as a retiree, grandparent, bike rider (bicycle and a new Harley-Davidson) and part-time consultant. And Cedar Lake has fared equally well and is flourishing!

In selecting Chris Stevenson as its President & CEO, Cedar Lake chose wisely. As evidence of that, Chris and his leadership team recently launched "Brand New Day," a comprehensive and exciting cultural renaissance emphasizing innovative DSP and workforce development initiatives, as well as a new \$13 million fund-raising campaign that will fuel Cedar Lake growth and refinements over the next four years.

*Jim Richardson [richardson.associates@insightbb.com](mailto:richardson.associates@insightbb.com) is President Emeritus of Cedar Lake, managing partner and senior consultant at Richardson Associates Consulting LLC, and a former ANCOR board member who was elected to ANCOR's inaugural Legacy Leader Circle in 2010.*



## 3 Steps to a Successful Lobbying Strategy

Mark Davis

In these tight budget times it's more important than ever to cultivate relationships with legislators. Knowing how to do so is essential for business success.



With budgets and economics being what they are, this road we're on just keeps getting bumpier. As we struggle along, we're challenged to find new and more efficient methods of reaching out and attaining our goals. Affecting positive change for our workforce and the people we serve is priority one, and the best way to do that is through effective lobbying. Here are three steps to successful lobbying which have proven successful in the past.

### 1. Be honest brokers of information.

Don't alter facts to support your position. Present data-based facts and reinforce those facts with personal stories. Our role as lobbyists is to be an honest broker of information. We inform the legislative and executive branch of government to enable their understanding of the day-to-day realities of providers and the people we serve. We hope to influence their decisions that impact our profession.

### 2. Relationships! Relationships! Relationships!

Our business is primarily based on relationships. It's essential that we treat everyone we meet with respect, as we do in our personal relationships. We need to actively listen to what the other person is saying, be engaged in the conversation and have empathy and understanding of their position. We need to know "what it is they're trying to scratch".

It's also important to establish relationships early. We need to focus on current leadership as well as identify who the emerging leadership is. Lobbying is more than presenting facts to legislators. It's about appealing to their human nature. It's essential they connect on an emotional level with what we do. Providers need to begin educating legislative leaders on our work, services provided and what we hope to accomplish early with emotional and human appeal.

Perhaps the most important aspect to developing relationships is to encourage involvement with everyone to impact a broader influence. Resources are scarce and we all know the saying about tough financial times: "when the watering hole dries up, the animals begin to look at each other differently". It doesn't have to be like that. Get involved with your sister health and human services organizations. Don't fight with each other, join and advocate for each other. Success for one is success for all. And remember, it's more important to get results than credit.

### 3. Have a strategic approach.

Be surgical in your approach, know what steps you need to take and count votes. Know who your supporters are and don't ask someone for something they can't give you. Know who the key legislators for your issue are and who to go to about what.

Timing is critical. Know when your issue is having a public hearing or a committee meeting is scheduled. Know what our sister health and human services organizations are doing and when their events are scheduled, and get involved with that.

Decide on the ultimate goal for your organization and lobbying efforts. Establish a "golden thread" that runs through all your efforts. For providers, this has often been direct support professional (DSP) compensation, benefits and stabilization. Always keep your ultimate goal in mind, and keep that focus to everything you do. If it's workforce for example, then DSP recruitment, training and retention should serve as a unifying thread to rally around.

### The Steps in Action

Recently we began an aggressive campaign to increase waiver rates in the state of Ohio. Following step one, over the years we've spoken with current and emerging legislators about the fragile nature of our workforce. They know we're 100% dependent on Medicaid funding, that 90% of our members have employees on public assistance, and the average DSP wage in Ohio is below the federal poverty level for a family of two. DSPs have told them their personal stories and made convincing arguments reinforcing the data.

Forging relationships, we've frequently met with key legislators identified earlier as emerging leaders and who are now in key positions. They're familiar with our issues, sympathetic to our cause, and have promised to work with us.

Strategically we know who the key players are, and the timing couldn't be better. The state has a budget surplus and about \$500M in our rainy day fund. Our waiver rates have stayed at the 2005 level based on 2003 data for 8 years, and the timing is right to push for an increase. We're feeling confident we'll be heard and are hopeful for some relief for our DSP's.

*"In the confrontation between the stream and the rock, the stream always wins; not through strength, but through perseverance." (H. Jackson Brown)*

Even the rockiest of roads can be driven if you have a map. Be relentless in your pursuits without being over-bearing and never lose sight of your goal. If you are an honest broker of information, maintain respectful relationships and are strategic in your approach, you will increase the likelihood of experiencing success. The best of luck with your efforts!

*Author LINK: Mark Davis, Director, ANCOR board of Directors, is President of the Ohio Provider Resource Association and ANCOR Board Liaison to the State Associations Executives Forum. He can be reached at [mdavis@opra.org](mailto:mdavis@opra.org).*



## Supporting Emerging Leaders in the Field

*Peg Gould*

Business models are changing, requiring leadership that can think beyond the current climate. While modernizing for the future, a good leader should also look to future leaders.

Emerging leaders will face a very different set of challenges than their predecessors. They will manage older more mature organizations, many of which developed in the 1950-60's as a result of deinstitutionalization. The current service system is based on "systems" that were replicated across the country. Group homes may have gotten smaller over the years, some even individual opportunities, but the approach and regulations remained fairly consistent. The same is true with day supports. Employment and day habilitation changed from center-based to community-based opportunities, but the basic structures are the same with a more inclusive approach

New leaders will address a different set of realities, many of which are challenging our systems and our traditional approaches. The questions before us are many: how to modernize the system, cooperate and collaborate more, utilize current technology, devise new business practices to foster efficiencies and effectiveness and promote an "outcome" driven



culture. The new measures will be less about growth through traditional service development and more about how to retool what we currently have and devise new innovative models and revised rate structures.

What is happening in our field is not unlike other companies. Over the years business modernization has been required to keep up with an evolving market place. For instance, right now Macy's has recognized that a stand-alone department store must be restructured. It needed to modernize to survive. Younger consumers saw the department store concept very differently than did older generations. They are more willing to shop online and prefer new and different services from a store, from apps to smart phone price checking. Macy's had to look at itself differently. Its present strategic plans are based on a new shopper and a new business model.

How do we modernize? How do we support new leaders? One way is to consider Benjamin Franklin's approach, "Tell me, and I forget. Teach me, and I remember. Involve me, and I learn." If we want to develop talented staff we need to open up opportunities for them to be engaged in decision making, while giving them the authority and responsibility for outcomes. Leadership is a learned art; it isn't something you can teach, you have to experience it. It is important therefore to provide opportunities for talented people in our field to create, develop new approaches and perhaps experience failure. But new leaders have to have a chance to spread their wings in order to solidify their vision.

We also must create forums for listening to new perspectives and responding to ideas. Not "tell" staff what we know, but meld our learned knowledge to help frame new approaches in response to emerging trends.

Current leaders should be proud of what has been accomplished. A more humane and positive set of approaches have brought a new age of self-determination and support options based on personal choice and individualized needs.

But, as Stephen Covey once said, "Live out of your imagination, not your history." New leaders will use the heritage that was created to move the system in a new direction, and perhaps a better set of ideas as we modernize.

People with disabilities today live in a changing world. And so we must respond. People with disabilities will become more technological and utilize their community's resources. We must adjust to provide new supports. People with disabilities will shop on line. They'll live with innovation, and they'll be one of Macy's customers.

New leaders will be charged with the responsibility of taking supports to another level that promotes perhaps a different definition of quality of life. Our task today is to help support the learning and growing process for new leaders. It is the legacy and the challenge.

*Author LINK: Margaret (Peg) Gould is President/CEO of The VISIONS Center for Creative Management and is a Special Projects Consultant, UCP of NYC.*



## In Leading, the Paradox of Competence

*Ron Langworthy*

In being a leader, being competent is not enough.

We all seek to be competent, but to paraphrase Jim Collins in *Good to Great*, the paradox is that competence is the enemy of greatness. To be great requires transcending competence. Although our world places enormous value on people who are exceptionally competent, that very competence can be a blindfold. When our competence works and produces kudos, are we likely to consider alternatives? Competence implies a massive rejection of alternatives that haven't worked, a progressive winnowing toward only the methods that get the job done. The winnowing helps us perfect our craft and at the same time blocks other options. Constantly reassessing assumptions slows down our competence. It isn't a common mental discipline. In order to move beyond what is merely good, greatness requires reassessing assumptions that may overthrow our competence.

We who work are required to develop job competence, but one great idea can turn it upside-down. In the mid 1970's I was working in a state institution, and I was pumped about Applied Behavior Analysis. I had a chance meeting on the street with a colleague who introduced me to a man I only recognized by name. As I walked away my jaw must have dropped to the sidewalk as I mentally took in the man's transformation in less than a year. Thus began my recognition of the stunning gains in humanity of the 'residents' who moved to the community. I trifled in the institution with manipulating small facts in the environment, but changing the entire environment changed the person in ways I had been unable to even hope for. The insight was so humbling it affected how I saw people for the rest of my life.

The visual evidence leapt past reassessing assumptions and replaced my competence with a new reality. What I had viewed as my area of expertise became a small part of a much expanded future. The experience gave me a passion for creating supportive living environments. That's not as flashy as, say, getting a law degree and working to free unjustly incarcerated individuals, but the world also needs supportive, healthy homes.

Competence at any job is a set of skills which are mostly learned as you practice. Most skills are what is left after we've seen other people fail and have ourselves tried unsuccessfully many times. For everything you know how to do the right way, you may remember many failures when you weren't as skilled as you are now. Many of your failures were situation specific and could work at a different time, place or context. However, you aren't likely to repeat what didn't work. And of course there are lots of techniques you haven't considered that could dramatically improve your skill even if you've been doing it well for a long time. Be skeptical of your competence. Competence can easily ease into complacency. Don't be reluctant to consider other ways of operating. The biggest improvement may be something in front of you every day. You are blinded to it by your success, because you are so... competent.

*After a bachelor's and master's in Psychology at the U of Montana, Ron Langworthy has worked in the field for 41 years in Montana (13 yrs), Massachusetts (1 yr) and Maine (last 27 yrs) and is planning to retire next year. He can be reached at [rlangworthy@cla-maine.org](mailto:rlangworthy@cla-maine.org).*



## Direct Support Workforce, Protection of Medicaid Dominate Member Priorities at Annual GR Retreat

*Barbara Merrill*

This year's GR retreat served as a useful education forum, as well as a platform for discussion on future endeavors.

With the ink on the New Year's Eve "Fiscal Cliff" legislation barely dry, 40 ANCOR members gathered in Baltimore for a two-day retreat to review ANCOR's public policy and National Advocacy Campaign priorities in the context of the evolving federal fiscal and political environment. The event featured Capitol Hill insiders, Obama Administration officials and ANCOR government relations staff.

Held in conjunction with ANCOR's State Association Executive's winter gathering, the Government Relations Committee and National Advocacy Campaign annual retreat featured a mix of presentations. Hosted by GR Committee Co-Chairs Than Johnson and Marty Lampner and NAC Steering Committee Co-Chairs Chris Sparks, Karin Stockwell and Daryn Demeritt, the focus of the retreat was to inform the committee's deliberations regarding the 2013 goals and objectives of ANCOR's National Advocacy Campaign. The diverse set of presentations, which included an analysis of a GR Committee member survey, individual leadership interviews and Maureen Corcoran's presentation of a draft proposal from ANCOR's Sustainable Medicaid Project workgroup, provided attendees with an array of options to discuss. Not surprising, the common themes that emerged from the group's discussion centered on the continued relevance of the National Advocacy Campaign's focus on the Direct Support workforce and corresponding protection of federal Medicaid funding. In addition to a briefing from noted DC lobbyists Licy DoCanto and Daniel Penchina on the post New Year's Eve "Fiscal Cliff" deal, attendees had the opportunity to directly engage CMS and a top Congressional staffer to further inform the committee's deliberative process, and share provider's perspectives with top public policy makers.

Senator Grassley's health policy director Rodney Whitlock made the trip to Baltimore to challenge ANCOR members to work towards a systems transformation that is not based on the medical model, incentivizes work, integration and independence, and establishes a national minimum coverage standard that would result in increased community options for people regardless of where they reside. Barbara Edwards, Director of CMS' Disabled and Elderly Health Programs, provided a very comprehensive update of re-balancing initiatives and current managed care, health home and integrated financing trends. Melissa Harris, Director, CMS Division of Benefits & Coverage, and Jeremy Silanskis, Deputy Director, Division of Reimbursement and State Financing, walked attendees through how providers can provide information to CMS as they review state plan amendments that make changes to services and provider rates, and Alison Barkoff, Esq, educated the group about significantly expanded Department of Justice's Olmstead enforcement activities.

Membership on ANCOR's Government Relations Committee is open to members in good standing and who have a demonstrated interest in working to advance ANCOR's public policy agenda. For more information, contact Barbara Merrill, Vice President for Public Policy at [bmerrill@ancor.org](mailto:bmerrill@ancor.org).



## In Other News

# New Horizons Resources, Inc. Undergoes Leadership Change

Regis Obijiski resigned his position as Executive Director of New Horizons Resources, Inc. and will now serve as the Deputy Director of Workforce & Talent Development for New York State OPWDD (Office for People With Developmental Disabilities).



Effective January 30, 2013, Executive Director, Regis Obijiski has resigned his position with New Horizons Resources, Inc.

Obijiski served New Horizons for 26 years and has been recruited by Commissioner Courtney Bourke to serve as the Deputy Director of Workforce & Talent Development for New York State OPWDD (Office for People With Developmental Disabilities). William Beattie, who has been with New Horizons for 30 years and most recently served as the Associate Executive Director, will be appointed by the board of directors to Obijiski's position.

New Horizons Resources, Inc. is a not-for-profit agency that provides services to 400 children and adults who have developmental disabilities and live in the Hudson Valley region of New York State. The agency was founded in 1974 by a group of parents seeking alternatives to institutionalized care for their sons and daughters. In 1981, the agency opened its first residences for adults with developmental disabilities and today operates 30 residences in Dutchess & Ulster counties.

The mission of New Horizons Resources, Inc. is to enable people with developmental disabilities to achieve fulfilling lives within their local communities by engendering a sense of home, belonging, self-determination, learning, productivity and individual respect.

*For more information on New Horizons Resources, Inc. and New Horizons Foundation, please contact Beth Cookinham, Foundation Director at 473-3000 x 322 or [bcookinham@nhrny.org](mailto:bcookinham@nhrny.org).*



## ANCOR CEO Honored

The National Children's Center honored ANCOR CEO Renee Pietrangelo with an award and an evening celebrating Chinese New Year.



ANCOR CEO Renee Pietrangelo was honored at ANCOR member National Children's Center's annual Chinese New Year Fundraising Celebration January 17 in Washington, DC. Hundreds of supporters of NCC and the NCC Foundation turned out at Ping Pong Dim Sum in Washington's Chinatown neighborhood for an evening that included a wide variety of dim sum, a dim sum making demonstration, silent auction and a raucous performance of lion dancers, a Chinese New Year tradition.

In presenting the award to Renee, NCC President and CEO Scott Filer cited Renee's service as an advocate and leader on behalf of providers, direct support workers

and people with disabilities. Also recognized at the event were Robert Kennedy, NCC Board member and employee of ANCOR member RCM of Washington; and Sir Peter Westmacott, British Ambassador to the U.S.





## Did You Know

# Sears Commercial's Best Values Program

ANCOR member discounts with Sears Commercial



Did you know? Sears Commercial has a specially-designed purchasing opportunity for ANCOR members with a Best Values Program for major appliances and household goods? Details [here](#).

ANCOR | 1101 King Street Suite 380 | Alexandria, VA 22314 | Phone: 703.535.7850 | [www.ancor.org](http://www.ancor.org)