



## Strategic Planning Meeting Notes

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March 5, 2024

Present: Chuck Bancroft, Cloud Conrad, Bruce Leyton, Ashley Trammel, Anslee Wilson, Bill Wittel

*Executive Director's note: The handout documents shared with meeting participants can be found on a private page on our website:*

<http://beyonddementiacoalition.org/dashboard30503>

### Agenda

- Welcome – Inspired by Gerry's focus on packaging our educational programming
- High level review of strategic direction for year 1, covering mission, objectives, and strategies
- Establish criteria/filters to help us determine which new initiatives to focus on and in what order (priority)
- Exploration of new potential initiatives within the context of our mission and objectives
  - Guided discussion to study unmet need, define success scenarios/metrics
    - Caregiver Curriculum
    - Workforce Development - Dementia Caregiver Assessment for Job Applicants
    - Care Programs/Caregiver Support
    - Credentialing
- Evaluate opportunities/initiatives against criteria, assign a priority to each (near, mid, or long term 1 – 5 year timeline)

*AGENDA NOTE: We did not explore Care Program/Caregiver Support Initiatives or Credentialing or evaluate the opportunities. We will repeat a process similar to this one when we are ready to look at these opportunities more closely.*

### Next Steps

April Board Meeting: share these notes in discussion with Board, further exploration of Caregiver Curriculum and Workforce Development initiatives and allow time to explore anything additional that surfaces, use evaluation criteria to vet initiatives and set timelines.

April: meet separately to develop vetted initiatives into detailed implementation/measurement plans

### Criteria

Through discussion we found consensus on the following as guiding criteria to vet initiatives:

- Demand (how can BDC help? Do we understand the need? Are we aligned with the user?)
- Current competency and/or existing program
- Low hanging fruit (quick sell, relationship tight, desirable partner)
- Shared mission with a partner

### New Potential Initiatives



## Caregiver Curriculum

- Concept Overview
  - Organized set of learning modules by topic, degree of complexity, advanced planning needs, and/or audience
  - Learners may follow a track or enroll a la carte
- Unmet Needs
  - Caregivers lack knowledge of dementia care and caregiver resources
  - Multitudes of information but what is vetted, where to start, no time to assemble an appropriate course of study
  - Myths abound, denial is common, caregivers lack awareness, caregivers need guidance to navigate grief for a living loved one
  - Peer to peer contact is lacking, how does one meet other caregivers on their own?
- Defining Success Scenarios
  - Caregiver has a plan
  - Quality of life remains good
  - Experiencing peace of mind
  - Students refer students (word of mouth)
  - Medical referrals (primary care, neurologist, etc)
  - Media takes interest and examines caregiver topics/trends (we are noteworthy AND part of a bigger conversation)
- Next steps
  - Define caregiver journey
  - Care Academy exploration

## Workforce Development – Dementia Caregiver Assessment for Job Applicants

- Concept Overview (see separate document)
- Unmet Needs
  - Finding/developing health care workers who are or could be compatible with dementia's needs
  - Finding/developing health care workers who are or could be able to fulfill the organization's mission statement and brand promise
  - Standardized protocol to assess dementia care aptitude and help define a development plan appropriate for the employee's individual needs
- Defining Success Scenarios
  - Documented staff turnover reduction
  - Documented job satisfaction increase
  - Customer satisfaction (family members?), survey metrics and testimonials
  - Trend in long term agreements with clients and/or increase in recurring revenue from clients
- Data
  - 46% turnover is average for home health care
- Next Steps



- Work with Assisted Living/Memory Care Human Resources (HR) Subject Matter Expert to create an assessment tool, based on Chuck Bancroft's model, that is appropriate for a job candidate in this type of care setting.

#### Parking Lot

- Ambassador program
- Board of Realtors connection
- Closing the preparedness gap
- RAD volunteer recruitment may have a need for dementia caregiver aptitude assessment
- Wealthcare