DePaul University ◆ School for New Learning ◆ Graduate Programs

MASTER OF ARTS IN APPLIED PROFESSIONAL STUDIES (MAAPS)

1 E. Jackson Blvd., Chicago, IL 60604 snlgrad@depaul.edu (312-362-8448)

GRADUATE LEARNING PLAN
for
MAAPS Student

•ADDRESS: •PHONE: •EMAIL:

DOCUMENT DATE: XXXX

FOCUS AREA:	- evaluating and enhancing business practices for organizations devoted to care of the elderly
Prof. Advisor:	**- PA, LICSW, LMSW, CSW-G, QDCS** •Position/Title: •Address: •Phone: •Email:
Faculty Mentor:	**- Dr. Russ Rogers** •Position/Title: Resident Faculty, School for New Learning, DePaul University •Address: DePaul University, 1 E. Jackson Blvd., Chicago, IL 60604 •Phone: 312-362-8512 •Email: rrogers@depaul.edu
Cluster:	**- XX**
Approval:	- ___2010___ *(date approved by Student's Academic Committee)* - ___2010___ *(date approved by Graduate Student Program Review Committee)*

▶PART I: Personal/Professional Background & Goals

Directions: In Part I, the student provides a context for the Graduate Learning Plan and a rationale for both his/her career direction and choice of the MAAPS Program of study as a vehicle to assist movement in that direction. Specifically, Part I is to include three sections:

A. a brief description of the student's personal and professional history (including education, past/current positions, key interests, etc.);
B. an explanation of the three or more years of experience (or equivalent) offered in support of the Graduate Focus Area;
C. a brief description/explanation of the student's personal and professional goals.

A. Description of My Personal/Professional History:

I hold two Bachelor's degrees—Sociology from the University of Illinois Urbana-Champaign and Accounting/Business Administration from Columbia College, Crystal Lake, Illinois. In addition, I have some graduate coursework in both library science from University of Illinois, Urbana-Champaign, and accounting from Keller Graduate School of Management, Oakbrook Terrace, Illinois, which I took as preparation for the Certified Public Accountant exam. Although my two degrees--sociology and accounting--may seem to be very different, they have common attributes that I find compelling—looking for patterns and answering the question "why?" In sociology, we look at the drivers of human behavior; in accounting we look for the activity that causes the end result as found in the financial statements.

My professional accounting career began over ten years ago—upon graduation from Columbia College, I began to work for a small property management firm. In this position, I learned about organization and time management. In addition, I became aware of the problems and limitations of running a small business. I also discovered that I have an aptitude for developing procedures, expediting processes, and problem-solving. I organized workflows, made proactive recommendations and set up systems to more efficiently handle the financial processes.

After a few years, I took a short break to take graduate accounting courses from Keller Graduate School and to prepare for the CPA exam, which I passed in 2004. During this time, I also worked with my husband, who started a benefits consulting firm; I researched and arranged for the incorporation of the business, set up and maintained the books, and worked on benefits consulting projects. I was required to obtain my insurance broker's license, which included Medicare supplemental insurance, so I became exposed to some of the complexities of the Medicare system.

I next worked for a not-for-profit healthcare provider, Hospice of Northeastern Illinois, wherein I saw the importance of applying sound business principles, even when there is not a profit motivation. What was particularly interesting to me was to see the conflict between those who wanted to run the organization as a business, and those who felt we should be strictly mission-driven. This job allowed me to further develop my ability and interest in accounting as related to healthcare and it also helped me see the importance of using good financial and business practices in a not-for-profit setting. This experience also helped me understand the importance of unity of purpose and goals—it was extremely difficult to effect positive change when no one agreed to what the needed changes were.

After I passed the CPA exam, I decided that I should get some work experience in public accounting. For a short time, I was employed by a small accounting firm that specialized in preparing compilations and reviews for franchise restaurants. Although the work itself was interesting and challenging, I found that the superficial nature of the work was unsatisfying. From this experience, I discovered that I prefer to work on a more in-depth and involved basis, and that this type of accounting did not fit with my future career goals.

I was hired as Accounting Manager for a small start-up telecommunications company, Firefly Mobile. This role was a confidence-builder, because a great deal was expected of me, and I was allowed to take on nearly anything I felt was needed. Some of the projects I undertook included developing an accounting function where one did not previously exist and delving into areas of human resources to bring our company into legal compliance with basic employment law. I was also able to participate in the initial nationwide launch of the company's first product.

My current position is Financial Consultant with XXXX Healthcare, Ltd., a consulting firm that specializes in working with long term care facilities, from development of new projects, management of existing facilities, and turnaround and management consulting for troubled organizations. In this position, I assist our clients with the financial planning of new facilities, financial reporting, operational audits, government reporting, and other types of financial support. My main career goal has always been to work with small organizations—those which I feel have the most need and the fewest resources. In this job, I am doing just that. In one of my first assignments, I worked with a small skilled nursing home in downstate Illinois. The facility's records are abysmal and they are having serious financial difficulties as a result. Ultimately, through my work, they will improve their record keeping, save time and improve collections, and thereby be able to maintain and improve the level of care they provide.

On a personal note, I am the mother of four children. The oldest is currently serving in the Navy. The youngest just started college. Another is working in day care, and the other is teaching English as a second language in Thailand, having graduated from DePaul University in June, 2009. My hobbies and interests include history, watching movies and documentaries about historical subjects, and travel to places of historical import. Another area of interest is computers and learning new software and technology. I also enjoy reading; now that I'm traveling for my job and spending hours on the road, I have indulged in audio books, which make the trips much more enjoyable. My husband and I attended the University of Illinois, Urbana-Champaign together. We will be celebrating our thirty-fourth wedding anniversary in 2010.

B. Explanation of My Experience in Support of My Graduate Focus Area:

I come to the desire to study my focus area from a number of areas. First, past employment and education have given me background and experience with small business, startup, and not for profit organizations. Each of these entities gave me experience that either directly presented opportunities for me to be exposed to the issues that I plan to study further or gave me a sense of the importance of good financial and organizational policies and procedures no matter what the size or form of the entity.

One of my goals after becoming a CPA was to specialize in small business consulting. My feeling has been that, although it won't make me rich, these are the business owners who most need professional assistance and can least afford high profile firms. These entrepreneurs have a talent or aptitude that they are trying to use to make a living; frequently they have little or no business knowledge, nor the time required to gain that knowledge. They need someone to rely to provide this expertise.

My interest in the healthcare field comes from both personal and professional experience. While working for Hospice of Northeastern Illinois, I felt the gratification of contributing to a worthwhile cause. Even though I was not a nurse or social worker with direct patient contact, I felt that my role was valuable because I was helping the organization be a good steward of its resources, thereby enabling more quality services to more people in need.

The event that brought these interests together and helped me begin to formulate the idea for my focus area was that my mother had a stroke two years ago. In dealing with the logistics of her homecoming and ongoing care, I became aware of the small companies that provide these services—nursing agencies that provide hourly nursing care, individuals who offer their services on an hourly basis, and the care managers who help families manage these difficult processes. I noticed that many of the agencies didn't abide by employment and tax laws. It's not that they aren't willing to obey rules and regulations, they either don't know about them or they don't have any idea how to proceed. And small agencies that provide minimum wage nursing assistants don't have the wherewithal to fix the problem. Thus began the idea for setting up a type of consulting practice that would address this need.

I have further developed and refined my focus area as a result of my current work experience. I have seen the problems with staffing, reimbursement, and the harm that lack of sound financial policies and procedures can inflict on an organization.

C. <u>Description/Explanation of My Personal/Professional Goals</u>:

There are a variety of outlets for my plan to provide business support to providers of care to the elderly. First, my current position with XXXX Healthcare as a Financial Consultant can be a delivery point to organized health care facilities and business, such as long term care facilities. As I develop my expertise and become more proficient in my core capabilities, I plan to develop a business plan and propose a new line of services that would focus on providing consulting services to other small businesses dealing with the care of the elderly, such as home health aide agencies.

Another method of dispensing my support services is through community college/community education outlets. I would like to develop a seminar for providers of services, particularly small businesses, involved in providing care that will target the issues of concern that I have addressed by my area of focus, such as financial issues, tax and employment regulations. This would be done concurrently with my consulting practice. I would also like to produce a manual or guidebook that could be used by other financial consultants so that they are able to offer similar services. I may eventually develop a training course or seminar to be presented at professional association meetings to enlighten and instruct other finance professionals in the needs of health caregivers.

I feel that, based on the aging of the population the intricacies of running a business (and the likelihood that it will get worse, not better), there will be a market for these services. In order to be successful in carving out a career in this area, I plan to become involved in my local professional organization and the health care roundtables, and eventually take on a leadership role.

Ultimately, I would like to be an Account Manager with a consulting firm. I would like to build a department to mentor young professionals who I hope will feel as committed as I to helping the elderly and their caregivers. Additionally, I hope to be something of an ambassador—bridging the divide between clinical and financial management—by having an understanding of both the caregiver perspective and the management. If I cannot find a firm that will allow me to pursue my interests, then I will start my own firm, possibly a not-for-profit.

I would also like to reach the expert level of my field, so that I can set up advisory websites, present at conferences and hold seminars in the area of finance and healthcare. I have met a few such individuals in my work and in preparation of my learning plan. I feel that, as they have made great strides to provide services that enhance the lives of the elderly, I can as well make a significant contribution to this field.

With the backing of my company, the experience and mentoring that I get from working with seasoned healthcare consultants, my CPA certification, and the Master's degree that I am pursuing I will have the proper credentials and credibility to make these goals possible.

PART II: Liberal Learning Self-Assessment

Directions: In Part II, the student reflects upon and assess his/her current performance in relation to the five LIBERAL LEARNING skills and specific facets associated with each (See HANDBOOK SECTION IV.) This self-assessment is important in identifying gaps between where the student sees him/herself now and where he/she wants to be in each of these areas at the end of the MAAPS Program. In this way, both strengths and limitations can be identified and either built-upon or resolved through specific Learning Activities in the student's Focus Area and/or through all-the-more purposeful participation in the Liberal Learning Seminars. Specifically, this section is to include:

A. a description of the student's strengths and limitations regarding each of the five Liberal Learning Skills & Facets including intended strategies for developing areas of limitation and enhancing areas of strength. *(For a fuller description of the LL Skills & Facets, see HANDBOOK SECTION IV.)*

B. a description of the student's particular interests in each of the six Liberal Learning Seminar topics. *(For a fuller description of the LL Seminars, see HANDBOOK SECTION IV.)*

A. Liberal Learning SKILLS—My Strengths & Limitations

(1) My facility with Self-Assessment & Self-Managed Learning

I am very adept at self-managed learning. Many of my accounting courses and CPA review were either online or independent study. I am accustomed to keeping schedules of due dates and exam deadlines. Most of my self-paced courses were completed weeks prior to the due date.

Similarly, in work situations, I have often been expected to perform my responsibilities without supervision. Many of my supervisors have frequently either been on the road or in a different office. I have been required to manage my own time and critique my own work.

As a social science major, I have become practiced in introspection. I oftentimes find myself evaluating my strengths and weaknesses. However, in doing so, one of my weaknesses comes into play. In opposition to the reading "The Ethics of Learner-Centered Education," which says that people tend to overestimate their abilities, I tend to underestimate myself. I tell myself, "If I can do it, anyone can." Consequently, I tend to devalue my opinions and input. Objectively, I know this is not true, but sometimes I have to be convinced.

Another weakness that falls in this category is that I do not like to restart work. Partially it's the nature of accounting that makes stopping and resuming a complex set of spreadsheets difficult, but it's something that I've found myself having trouble with consistently. I don't have a problem with working extended hours on a project, and I believe that I do this because of the fear of the difficulty of resuming at a later time.

A few things I have in mind to do to further work on this area are:
-learn and utilize reflective journaling
-improve and expand my use of project lists, timelines, and maintain calendars
-use methods learned in Leadership seminar to better understand what has made me the person I am, and how I can use this to make improvements

(2) My facility with Critical, Creative & Systemic Thinking

I believe that one of my strengths is in evaluating complex situations or problems and finding solutions for them. I have been able to expedite processes and develop procedures by looking at the desired end result and available resources. I have created procedures for solving problems involving multi-site business entities. This required flow-charting, analyzing stages, steps, and timelines. It also involved implementation and follow-up to see that everything worked as planned and that there were no unintended consequences.

I would say that my weak points in this area are in producing a coherent report of the analysis that I have done. In sum, I would say that I'm strong at the front-end of the process, but weak at the end—good at the analysis, but not as good at assembling and conveying the results of that analysis. I'm also an excellent planner but less than ideal at following through. I realize this and fully understand that this is a weakness, and I hope to continue to work on improving my project completion and follow-through abilities.

A few things I have in mind to do to further work on this area are:
-prepare work plans that give equal emphasis to all phases of a project so that I give equal weight to the summary and completion of the project
-utilize mind-mapping as a method of note-taking
-identify and practice creative thinking exercises

(3) My facility with <u>Applying Values-based Decision-Making</u>

Personally, I have very little experience with values-based decision- making. However, I have a healthy respect for ethics and honesty. The accounting profession has, on paper at least, held ethics and values as critically important. So, while I understand and fully support the importance of upholding high standards, I haven't had opportunities in which to apply these standards. I have evaluated the ethics and values of others, in some of the well-known cases in the news, for example. And I fail to understand how some people are able to rationalize their behavior.

I feel that, on an intellectual level, I am very comfortable to applying values to decision-making situations, but I have to learn how these work in the application.

A few things I have in mind to do to further work on this area are:
-get a better feel for professional ethics in my own field of accounting
-analyze decision situations in order to assess what values come into play in making those decisions
-build awareness of the ethical values of organizations with which I work, including competing value systems within a single organization

(4) My facility with <u>Various Modes of Communication</u>

I believe that I communicate well in writing. It has been necessary that I communicate complex messages, such as retirement plan or benefits information, company-wide via email. Because of this, I was required to formulate clear and concise messages that would be understood by all employees.

In another work situation, my job was to assist non-finance managers in understanding their departmental financial statements and explain budget variances. These were nurses who were complete novices to reading a financial statement. I met with each of them and explained what the accounts, categories and variances meant, and how to provide a meaningful explanation of the cause of variances (not just "because we spent more").

I do not have very much experience with speaking to groups and running meetings. Additionally, I have noticed that I sometimes interrupt others when they are talking to me and I have made a conscious effort to stop doing that. Another difficulty I have is with listening; I find myself formulating a response before the other person has completed his/her thought. Finally, I feel that I don't express myself as well as I'd like sometimes and that I may tend to ramble and lose track of my point.

A few things I have in mind to do to further work on this area are:
-attend seminar on mediation
-practice preplanning conversations and meetings so that I feel more confident in my interactions
-objectively review the results of conversations to determine what works and what doesn't

(5) My facility with Interpersonal Relations

I am not a people person. I have realized this from the time I was very young. I don't like, and consequently avoid, parties and large gatherings. Frankly, I had some difficulty with class discussions in our learning plan development class, although I pushed myself to be social and to offer my opinions. This is partly due to my issues in #1—undervaluing the worth of my accomplishments and my input. I have been told that I scare people and that I'm not an open, welcoming person. I am uncomfortable with strangers, and I don't like to talk unless I have something worthwhile to say—I strongly dislike "chatting." This gets in the way of networking and building professional and employment connections, not to mention personal friendships.

Since I believe that acknowledging that you have a problem is the first step to solving it, I feel rather positive about my ability to overcome my weaknesses in this area. I have begun to extend myself to colleagues; even those who I felt were "above" me in experience and ability. I feel that I have reasonably successful in extending myself to my cluster in our initial SNL course.

A few things I have in mind to do to further work on this area are:
-join in professional networking opportunities
-continue reaching out to other professionals in my focus area, including remaining in touch with those interviewed in learning plan development process
-practice extending myself to friends and colleagues

B. Liberal Learning SEMINARS—My Hopes & Interests

(1) My hopes/interests for Exploring Modes & Processes of Systematic Inquiry **(LLS-425)**

One of the things I like best about accounting is the digging for the "whys" of the financial statements. This topic holds great interest to me. As I remember my undergraduate studies in sociology, I recall research methods class, wherein we designed a very small scale study and carried it out; my senior honors thesis utilized statistical analysis to find relationships amongst variables.

My intent for this course is that I can learn and experience in greater depth the techniques of research. I also feel that becoming more adept at systematic inquiry, which I take to mean developing an approach to solving a problem, not simply sitting around thinking about it and waiting for the apple to fall on one's head. This would be extremely useful in life, in work, and of course, in my graduate student career.

(2) My hopes/interests for Understanding Personal & Org. Change **(LLS-435)**

Having just gone through both personal and corporate change, the study of change is very interesting to me. I recently worked for a company that went through reorganization and then later liquidated and went out of business. I was closely involved in both processes, neither of which was handled with anything approaching a plan.

One element of my focus area is to assist organizations to bridge mission to business management, another issue that I've observed first-hand. There can be a significant level of stress and dissatisfaction as employees who feel budgets have no place in a not-for-profit butt heads with those whose task it is to monitor expenses—to "run the place like a business".

Both these situations are applicable to my focus area and I would like to learn about how best to handle these types of change.

(3) My hopes/interests for Enhancing Interpersonal Dynamics **(LLS-445)**

As I mentioned in my self-evaluation above, interpersonal interaction is not a strong area for me, nor am I very comfortable developing professional and personal relationships. Therefore, I hope to learn skills and strategies for improving my professional image and identity.

I have also been in work situations in which a coworker was a disruptive influence to the entire company. Her boss did not know how to handle the situation, which ultimately resulted in the loss of other employees. I would be interested in learning how management should have handled this type of situation.

(4) My hopes/interests for Valuing Human Differences **(LLS-455)**

I would like to apply the study of human differences and societal prejudices in relation to the elderly. That fits into my focus area so it's a natural interest to me for that reason. Additionally, I have general ideas of how society devalues and discriminates against the elderly, but I'd like to study this further. Although affirmative action applies to age discrimination, it's very difficult to prove that one has not been hired because of age. Although a portion of the elderly population is retired, given the recent economic trends, many more will stay engaged as productive members of society. How a youth-oriented society reacts to them will be an interesting area of study.

(4) My hopes/interests for Engaging Ethical Reasoning **(LLS-465)**

Ethics has gotten significant attention in the accounting profession in the past few years. Licensed CPAs are required to take ethics continuing professional credits every three years, so it is an area with which I am familiar. However, I am very interested in the environment that allowed the accounting and business scandals to occur. I believe that the conditions are not exclusive to the accounting and big business worlds, so in my work with small business and not-for-profits I expect to see the same behaviors. Privacy regulations are particularly important in the healthcare fields. How an organization values and promotes ethical behavior is very pertinent to my area of study.

Also important to my focus area are the ethics of the professionals with whom I deal. The specialized ethical standards of healthcare professionals and business owners will also be a focus of my learning plan.

Finally, I hope to explore my personal ethical standards, separate and apart from those of my profession. I need to understand the implications of

(5) My hopes/interests for Exercising Effective Leadership **(LLS-475)**

Effective leadership is something I recognize when I see it. Quantifying it is another matter. I have worked for both effective and ineffective managers. One of the brightest men I have ever met was a terrible leader, who couldn't convince anyone in the company to comply with his policies. I would like to learn how to be an effective leader. It doesn't matter if one has great ideas if s/he can't convince anyone to listen and follow them. So I would like to be able to put my thoughts and ideas together in a coherent and convincing manner, and then be able to follow through with implementing them. I also hope to learn how best to serve as a mentor in order to encourage the involvement of more finance professionals in issues of the elderly.

▶PART III: The Graduate Focus Area

Directions: In Part III, the student offers a thorough definition and explanation of the individualized, career-related area that serves as the focus for his/her graduate study. Specifically, Part III is to align clearly with Part I (above) in terms of the student's background, current situation and goals and include the following:

A. a PHRASE describing the student's individualized Graduate Focus Area including its core activity and primary context for application (i.e., "doing what? where?")

B. an EXPLANATION of the phrase including its meaning, major components, major trends, knowledge base(s), major contributors, "cutting edge" areas, and list of resources consulted.

(For a fuller description of the Graduate Focus Area, see HANDBOOK SECTION V.)

A. My Graduate Focus Area PHRASE:

Evaluating and enhancing business practices for organizations devoted to care of the elderly

B. EXPLANATION:

(1) Definition: What does the phrase (above) mean? Please provide here a brief narrative explanation of the Focus Area phrase (above).

What my focus area phrase means is that I plan to study theories and methods from a variety of subject areas in order to analyze the effectiveness of organizations that provide services to the elderly. In other words, I hope to help those organizations that provide services to the elderly by analyzing business practices and offering methods to improve and streamline processes or correct deficiencies in areas such as financial management, human resources management and organizational development.

I plan to learn strategies and processes that can be implemented in order to improve their effectiveness and profitability. More specifically, the service I plan to provide these organizations is to analyze business practices and offer recommendations for operational improvements—to streamline processes or correct deficiencies in areas such as financial management, human resources compliance and organizational development. In doing this, I plan to utilize and augment my knowledge of finance and business practices in order to improve the viability of organizations that supply goods and services to the elderly.

I am particularly interested in focusing on those entities that might not otherwise have access to management consulting services, such as small- to medium-sized organizations, including not- for-profit organizations and government-run facilities.

I plan to study, understand and be able to apply:
-analysis of organizational operations in order to identify deficiencies and areas for improvement and enhancement
-subject areas that relate to the care of the elderly, particularly life-maintenance goods and services to understand the specialized needs of the elderly, so that I can identify particular organizational characteristics of those entities
-regulatory issues that govern organizations that provide services to the elderly, including employment and statutory regulations (such as Medicare and Medicaid)
-future demands for goods and services used by the elderly, and other trends that affect service providers.

(2) Major Components: What are the major components included in this Focus Area and how do they relate to each other?

Evaluating means to look at the organization, analyze the dynamics in order to get an understanding of the processes and procedures that work, those that don't work, and areas that are deficient

Enhancing means offering solutions that solve problems and address issues faced by the service providers, in order that they may provide more and improved services for the same or lower cost.

Business practices refers to the operational management side of an organization—human resource practices, financial management processes and procedures, organizational development and managing change. This also refers to compliance issues regarding billing procedures and employment regulations. Additionally, this refers to improving leadership, communication and management skills.

Organizations are those providers of goods and services that the elderly require in order to maintain a high quality of life include medical care, housing, caregivers, residences, whether not for profit, private, or governmental.

Devoted to care are those entities that provide life-management goods and services to the elderly—for example, home healthcare services and supplies, medical equipment, residential facilities, such as skilled nursing and assisted living communities. These are organizations that are frequently paid by insurance, including Medicare and Medicaid.

The elderly include those who are of retirement age, generally Medicare or retirement community-eligible, or anyone over 65 years old.

(3) Major Trends: What are the major trends affecting this Focus Area?

Demographics:
Aging population (US Census Bureau)
Poverty levels of the elderly (Urban Institute/Brookings Institution)
Makeup of elderly population is changing (Urban Institute/Brookings Institution)

Regulatory:
Healthcare reform—what's going to happen with Medicare, Medicaid, and long-term care? (Tax Policy Center)
Problems related to small business employment law compliance--top challenge of small business (BLR survey)
More lawsuits filed due to employment law violations (SHRM)

Business/management:
Negative outlook for continuing care retirement communities CCRC—earnings, cash on hand drop (Fitch Ratings)
New paradigm for healthcare—better care that costs less (Shumway)
Restricted resources, management styles, adapt financial indicators (Shumway)
How to do more for less; what is more, how much is less, and how to you measure success? (Shumway)
What performance measures evaluate results? (Fischer, Berger)
Nursing shortage and poor employee retention (HFMA)

(4) Knowledge Base(s): What areas of knowledge (disciplines/fields) are most relevant to this Focus Area?

Finance and Business

-Accounting/Finance (focus on health care)—understanding and applying accounting principles, particularly costing, benchmarking, and other financial management tools is critical to the success of eldercare organizations

-Human Resources—employment policies and compliance with employment laws and regulations is a major cost and concern for small companies

-Business, management, organizational behavior & development—government cutbacks and greater competition are causing facilities to need to learn to provide more and better services at lower cost

-Leadership and management—understanding how to improve employee satisfaction, thereby retention, and communication, especially during financially stressful times, is important to the successful management of all organizations

Social Sciences and Clinical (empirical)

-Gerontological Social Work—social workers deal with eldercare issues, and the study of social work

-Sociology/demographics—aging population, changing family structure (working children of elderly parents, fewer children) make family caregiving more challenging

-Public Health—public health policies affect eldercare, new and proposed legislation can determine processes and procedures that eldercare facilities will need to be aware of

-Housing alternatives for the elderly—a large percentage of the elderly will spend some time in some type of community living setting, therefore understanding these facilities is going to be an important part of eldercare

-Reimbursement, including Medicare/Medicaid/insurance billing processes and procedures—a large percentage of eldercare services are paid for through one of these programs, so it is critical to understand the processes and regulations as well as understanding the implications to organizational operation

(5) Major Contributors: Who are some of the major contributors in this Focus Area (e.g., authors, researchers, professional associations, etc.)?

Finance/Accounting

Practitioners/researchers:
Steven Finkler, PhD, CPA—healthcare costing professor and author
Richard L. Clarke DHA—President Healthcare Financial Management Association

Organizations/websites:
Healthcare Financial Management Association (www.hfma.org)
American Institute of Certified Public Accountants (www.aicpa.org)
Illinois Certified Public Accountant Society (www.icpas.org)
Institute of Management Accountants (www.imanet.org)

Books/Journals:
Journal of Healthcare Finance (Wolters Kluwer)
International Journal of Healthcare Finance and Economics (Springer)

Gerontology/Social Sciences

Practitioners/researchers:
Barbara Berkman, DSW, Columbia University School of Social Work
Rosalie A. Kane PhD, University of Minnesota
Nancy Hooyman PhD, University of Washington

Organizations/websites:
The Gerontological Society of America (www.geron.org)
National Institute of Nursing Research (NINR, www.ninr.nih.gov)

Books/Journals:
Journal of Gerontology (Gerontological Society of America)
Contemporary Gerontology (Springer)

Management/Organizational Development

Practitioners/researchers:
Peter Drucker
Kurt Lewin—unfreezing-change-refreeze model of change theory
Edgar Schein—cognitive redefinition
Ross Wirth—gap analysis

Organizations/websites:
Organizational Behavior Management Network (www.obmnetwork.com)
Organizational Behavior Teaching Society (www.obts.org)
The Cambridge Center for Behavioral Studies (www.behavior.org)

Books/Journals:
Journal of Organizational Behavior Management (Haworth Press)
Classics of Organizational Behavior, by Natemeyer & McMahon
The Blackwell Handbook of Principles of Organizational Behavior
Leadership and Organization Development Journal (Haworth Press)

(6) Cutting Edges: What are the key areas of knowledge and skill required to be on the "cutting edge" of this Focus Area? In which areas do you already possess competence? In which areas are you seeking new learning?

Goal-centered management/Management by objective as used in health organizations
Six sigma for healthcare organizations
Adaptation of financial measures for non-finance managers

Bridging the goal and communication gap between clinical and finance
Running not for profit and mission-oriented organizations as businesses
Scorecard keeping/dashboards are being used to monitor financial indicators
Aging in place for the elderly
Medicare/Medicaid financial problems and changes; what will this mean for service providers

(7) Resources Consulted: What resources did you consult in answering the previous questions and building your Graduate Learning Plan?

***Authors/Contacts** (*Interviewed):*

Social Work/Gerontology Researchers:

- Barbara J Berkman DSW, author, professor, Columbia University School of Social Work bb151@columbia.edu, 212-851-2398 Handbook of Social Work in Health and Aging.
- James Blackburn PhD, Hunter College School of Social Work James.blackburn@hunter.cuny.edu, 212-452-7085
- Suzanna Waters Castillo, MSSW, PhD, University of Wisconsin-Madison 608-263-3174; scastillo@dcs.wisc.edu
- Rosalie A. Kane PhD, University of Minnesota, teaches LT care, ethics & aging, kanex002@umn.edu, 612-624-5171
- *Daniel Kaplan, Doctoral student, Columbia University School of Social Work, dbk2006@gmail.com
- Colleen Galambos, PhD**,** Professor Editor-in-Chief Journal of Social Work Education, School of Social Work, University of Missouri 523 Clark Hall Columbia, MO 65211-4470 Phone: (573) 882-3701 Fax: (573) 882-8926 E-Mail: galambosc@missouri.edu
- Pat Gleason-Wynn, PhD, LCSW, RN Gerontological Consultant, Lecturer Mailing Address 5009 Sheridan Court, Arlington, TX 76017 Email drpgw@yahoo.com Phone 817.468.0979 (home), 817.680.2236 (cell)
- Dr. Marion Somers, drmarion@doctormarion.com, www.doctormarion.com;
- Priscilla (Lilly) Allen, PhD, MSW Associate Professor, LSU School of Social Work, Associate Director, LSU Life Course & Aging Center 311 Huey P. Long Fieldhouse Baton Rouge, LA 70803 225-578-1325; Interest areas: Aging and Long Term Care, particularly nursing home care quality, the Long Term Care Ombudsman Program, social work provision in nursing homes, interdisciplinary studies of healthy aging, policy issues of aging, ageism.
- Jean Correll Munn, PhD, Assistant Professor, 2511 C University Center, PO Box 3062570, College of Social Work, FSU, Tallahassee, FL 32306 jmunn@fsu.edu (850) 644-9748 Areas of specific interest: nursing homes, assisted living facilities, end of life, mixed methods

Clinical practitioners:

- *Melissa Cronin, MS, AgeWise Care Management, Champaign IL 217-898-8125
- *Amy Wingo, MS CRC AgeWise, 217-898-8125
- *William Gingold PhD, U of IL, geriatrics, psychology
- *Grant Shumway PhD, gshumway@reverehc.com, Revere HC CEO
- *Thomas Day, National Care Planning Council director, LT care planning, (801) 298-8676, tomday@longtermcarelink.net
- *Emily Preston, RN, Director, Provena Homecare and Hospice
- *Polly Zimmerman, RN, MS, MBA, Truman College, Instructor

Management/Organizational Behavior:

- Peter Drucker, Managing the Nonprofit Organization
- Dennis Young, Georgia State University - Andrew Young School of Policy Studies dennisryoung@gsu.edu
- HFS Consultants, Oakland CA
- *Greg Horner, manager, Six Sigma black belt (DePaul University Cluster #XX)

Finance/Accounting:

- *Steve Berger, CPA, sberger@hcillc.com, Healthcare Insights LLC, Libertyville IL
- *Steven Finkler, PhD, steven.finkler@nyu.edu, professor emeritus
- *Richard L. Clarke, rclarke@hfma.org, president HFMA

Associations:

- American Institute of Certified Public Accountants (www.aicpa.org) member
- Illinois Certified Public Accountant Society (www.icpas.org) member
- National Association of Social Workers (www.socialworkers.org)
- National Assn of Professional Geriatric Care Managers (www.caremanager.org)
- Healthcare Financial Management Association (www.hfma.org) member
- Institute of Management Accountants (www.imanet.org) member
- American Health Care Assn. www.ahca.org state health organizations—statistics, trends in LTC
- National Care Planning Council, www.longtermcarelink.net
- The Urban-Brookings Tax Policy Center www.urban.org
- American Association of Healthcare Consultants www.aahc.net
- New York Nursing Home Administration Guide, www.health.state.ny.us/professionals/nursing_home_administrator
- Business Week, HR for Small business, http://www.businessweek.com/smallbiz/servicecenter/humanresources.htm
- Society for Human Resource Management, www.shrm.org member
- Business & Legal Advisor, www.BLR.com
- Kalorama Information Market Intelligence Reports (demographic reports)
- Elder Health Resources of America, 50 Bridge St. Ste 515, Brooklyn NY 11201

Websites:

- Administration on Aging http://www.aoa.dhhs.gov/
- American Association of Homes and Services for the Aging http://www.aahsa.org/
- American Association of Retired Persons http://www.aarp.org/
- American Bar Association http://www.abanet.org/
- American Geriatrics Society http://www.americangeriatrics.org/
- ELDR Magazine http://www.eldr.com/
- Medicare http://www.medicare.gov/
- Medicare Rights Center http://www.medicarerights.org/
- Mr. Long-Term Care http://www.mrltc.com/
- National Association for Home Care & Hospice http://www.nahc.org/
- National Association of Area Agencies on Aging http://n4a.org/
- National Association of Professional Geriatric Care Managers http://www.caremanager.org/
- National Association of Social Workers http://www.socialworkers.org/
- National Association of State Units on Aging http://www.nasua.org

- National Caregiving Foundation http://www.caregivingfoundation.org/
- National Center For Assisted Living http://www.ncal.org/
  National Family Caregivers Association http://www.nfcacares.org/
- National Health Information Center http://www.health.gov/nhic/
- National Institute on Aging http://www.nia.nih.gov/
- RetirementHomes.com http://www.retirementhomes.com
- Senior Journal http://www.seniorjournal.com/
- Senior Law http://www.seniorlaw.com/
- Social Security Administration http://www.ssa.gov/
- Society of Financial Service Professionals http://www.financialpro.org/
- The Gerontological Society of America http://www.geron.org/
- US Department of Health and Human Services http://www.hhs.gov/
- US Department of Housing and Urban Development http://www.hud.gov/
- National Institute of Nursing Research (NINR, www.ninr.nih.gov)
- Institute for Health Research and Policy (www.ihrp.uic.edu)
- Qualitative Research International (www.qsrinternational.com)

Books/Journals:

- Business Ethics in Healthcare: Beyond Compliance, by Leonard J. Weber
- The Balanced Scorecard, by Kaplan & Norton
- Hardwiring Excellence, by Quint Studer
- The Power of Clinical and Financial Metrics, by Steven Berger
- Financial Management of Healthcare, by Steven Berger
- Lean-Six Sigma for Healthcare, by Caldwell et al.
- Improving Healthcare Using Toyota Lean Production Methods, by Robert Chalice
- Qualitative Health Research, (www.qhr.sagepub.com)
- Qualitative Research, (www.sagepub.com)
- Qualitative Research in Organizations and Management: An International Journal
- Studies in Qualitative Methodology, Elsevier Science, Inc.

▶ PART IV: Application Setting

Directions: In Part IV, the student describes the setting (work or otherwise) that will serve as his/her "laboratory" for both applying learning to practice and deriving learning from practice with respect to the Focus Area and the Liberal Learning Skills/Seminars. In short, the question to explore here is "where will you apply learnings from your graduate study…and how (in what capacity)?"

A. My Application Setting:

The setting in which I will learn and apply my study of eldercare issues is my current employer, XXXX. I am employed as a Financial Consultant, providing services to skilled nursing, assisted living, and other community-living facilities for the elderly. My current responsibilities include financial reporting and consulting, operational evaluation, feasibility analysis and strategic planning. Clients include for-profit, not-for-profit, governmental institutions, small, independent facilities as well as subsidiaries of larger corporations. I become involved in all phases of operations, from planning, financing and building the facilities, through operational turnarounds of existing facilities.

I will have access to our clients to use as a 'laboratory' as well as to see first-hand the problems and issues that I am hoping to address through my focus area and competencies. For example, I recently participated in an operations audit of a facility wherein I heard from current employees the problems of mission v. bottom line. One of our goals as a company is to find ways to achieve a financial turnaround while maintaining or even enhancing the level of resident care. My employer is enthusiastic about the 'win-win' opportunity for me to study while providing additional services to our clients at minimal cost. He is also pleased that I am pursuing this area of study, as it will enhance my value to our clients and the company.

XXXX is celebrating its twenty-five year anniversary next year. It is a consulting and development firm that specializes in managed care and other community-living facilities primarily for the elderly. XXXX has worked with over 100 clients spanning forty states. The CEO has over thirty years in the long-term care industry, including development of new facilities, managing and turnaround of troubled facilities, and enhancing levels of care. He has also studied psychology and organizational development. My direct supervisor, XXXX, is a Chartered Accountant who has worked for over thirty years in healthcare finance in a variety of settings. He is a specialist in Medicare/Medicaid reimbursements, and is proficient in financial projections and analysis. Other colleagues include marketing specialists and nursing home administrators, many of whom hold advanced degrees.

Current projects include feasibility studies to determine demand for skilled nursing facilities, market analyses which provides more specifics as to the demand for various facilities and price points, level of care, amenities, and other characteristics of the proposed facility. XXXX also provides construction and financing consultation for pending projects; currently we are working with several in-process communities in various stages of the design, development, and construction process. These facilities include the spectrum of elderly housing, from independent living through skilled nursing. We are also developing projects for more specialized healthcare concerns, such as traumatic brain injury, dementia, and veteran's assisted living. XXXX is currently supplying management services to skilled nursing homes and management/financial support and consulting services to over a dozen facilities.

▶PART V: Professional Competencies

Title Page to Part V

This page provides an overview of the following NINE PAGES of the Graduate Learning Plan. In brief, these nine pages outline the plan for the student's development and demonstration of graduate-level comprehension and skill regarding the **eight Professional Competence Areas.** One page is devoted to each of the eight competence areas—with the ninth page reserved for a supplemental competence in one of the previous areas. A fuller description of each competence area is included at the top of each of the subsequent pages.

DIRECTIONS: In designing Part V, please use the following nine pages as templates. Each page includes a general description of a particular Professional Competence area and a table or grid for your individual design.

AP-510: Ability to understand the **main theories** that guide and explain practice in the Focus Area.

AP-520: Ability to understand **methods of research** appropriate to the Focus Area.

AP-530: Ability to apply **specialized skills** appropriate to the Focus Area.

AP-540: Ability to engage **communication modes** appropriate to the Focus Area.

AP-550: Ability to understand the **organizational and/or interpersonal dynamics** within which practitioners in the Focus Area define and fulfill their roles/responsibilities.

AP-560: Ability to interpret **challenges from larger contexts** (e.g., temporal, social, or international) facing the Focus Area.

AP-570: Ability to analyze **ethical issues** involved within the Focus Area.

AP-574: Ability to engage **reflection in/on practice** within the Focus Area.

AP-585: A second competence (supplemental) in one of the previous areas.

Name: XXX XXX **DePaul #:** XXXXXX **Cluster #:** XX **Date:** for later use

• Professional Competence AP-510 •

Ability to understand the MAIN THEORIES/IDEAS guiding and explaining Focus Area practice.

"can describe and analyze at least two significant ideas (e.g., theories, models, principles, and/or concepts) in the focus area or related fields—including implications for practice."

DESCRIPTION of AP-510 (2 cr hrs): This area addresses knowledge and understanding of theories, models and/or theoretical frameworks—including their implications for practice—relevant to the Focus Area. In areas where theories are not well established (e.g., emerging fields of study or in unique combinations of fields), this area includes exploration of theories in related fields. As the student addresses contemporary theories, he/she should be familiar with their relationship to theoretical traditions. Successful demonstration of competence in this area includes:

(a) Knowledge of the differences among the terms—theory, concept, principle and model;

(b) Ability to analyze (compare, contrast, critique—not merely describe or react to) theories or their counterparts including their application to practice.

PLAN for AP-510	
(1) Competence Statement *(competence outcome)*	▶**Outcome:** Can describe and analyze the theoretical concepts of healthcare economics as such impacts my focus area.
(2) Learning ACTIVITIES *(means to accomplish competence outcome)*	▶Activities: ***Ashford University MHA 618 Health Economics***. This course focuses upon the analysis of health care operations and planning decisions derived from the theoretical concepts of demand, cost production, profit and competition. External and internal forces challenging health care services are analyzed. Organizational effectiveness and efficiency within the complex health care environment are emphasized (See 'Appendix for AP-510'; mentor has complete course syllabus on file.) ▶**Initial Literature:** Per course
(3) Learning PRODUCT(s) *(evidence demonstrating competence outcome)*	▶**Demonstration:** Completion of course and grade
(4) Assessor *(anticipated)*	- Course Professor
(5) Schedule *(anticipated)*	-TBD

Name: XXX XXX **DePaul #:** XXXXXX **Cluster #:** XX **Date:** for later use

• Professional Competence AP-520 •

Ability to understand METHODS OF RESEARCH appropriate to the Focus Area.

"can describe and analyze at least two methods of gathering data appropriate to the focus area and develop a detailed protocol for implementing one."

DESCRIPTION of AP-520 (2 cr hrs): This area addresses the systematic gathering of data and interpretation of findings as practiced within the focus area and/or related fields. Successful demonstration of competence in this area includes:
(a) Knowledge of the types, purposes, and relative utility of research methods (not "tools" such as library and internet research per se) currently practiced in the profession;
(b) Understanding contingencies involved in the appropriate application of each; and,
(c) Ability to develop a protocol for implementation.

PLAN for AP-520	(NOTE: Students are advised to register/complete this competence (AP-520) during the same quarter in which they register/complete LL Seminar LLS-425.)
(1) Competence Statement *(competence outcome)*	▶**Outcome:** Can describe and analyze at least two methods of gathering data appropriate to my focus area and develop a detailed protocol for implementing at least one of them. (Specific methods to be identified later.)
(2) Learning ACTIVITIES *(means to accomplish competence outcome)*	▶**Activities:** ***EA 525 Conducting Practice-Based Inquiry.*** This course builds participants' competence in practicing a repertoire of formal and informal inquiry processes. Participants explore a range of research methodologies and identify those most relevant to their practice environments. Participants gain further skills in defining research problems and questions, conducting literature reviews, creating research designs, citing sources and protecting human subjects in research. ▶**Initial Literature:** Per course
(3) Learning PRODUCT(s) *(evidence demonstrating competence outcome)*	▶**Demonstration:** Completion of course and grade
(4) Assessor *(anticipated)*	-Course professor
(5) Schedule *(anticipated)*	-TBD

Name: XXX XXX **DePaul #:** XXXXXX **Cluster #:** XX **Date:** for later use

• Professional Competence AP-530 •

Ability to apply SPECIALIZED SKILLS appropriate to the Focus Area

"can describe and demonstrate skill (or set of skills) relevant to the focus area."

DESCRIPTION of AP-530 (2 cr hrs): This area involves identifying skills that are particular to the profession and the context(s) in which these skills are applied. The emphasis is on actual demonstration of specialized skills used in practice. Successful demonstration of competence in this area includes:

(a) Selection of skills that appropriately represent the profession & one's professional goals; and,
(b) Application of skills at a level appropriate to both professional contribution & graduate study.

PLAN for AP-530	
(1) Competence Statement *(competence outcome)*	▶**Outcome:** Can describe and demonstrate the specialized skill of development and use of budgets and dashboards/scorecards in health care institutions as it is practiced in my focus area.
(2) Learning ACTIVITIES *(means to accomplish competence outcome)*	▶**Activities:** Independent study ▶**Initial Literature:** (See 'Appendix for AP-530') Strategic Management of Health Care Organizations by Linda E. Swayne, W. Jack Duncan, and Peter M. Ginter Budgeting Concepts for Nurse Managers, by Steven A. Finkler PhD CPA and Mary McHugh Budgeting Basics and Beyond, by Joel Siegel Health Care Budgeting and Financial Management for Non-Financial Managers, by William Ward The Balanced Scorecard, by Kaplan & Norton Hardwiring Excellence, by Studer The Power of Clinical and Financial Metrics, by Steven Berger Financial Management of Healthcare, by Steven Berger
(3) Learning PRODUCT(s) *(evidence demonstrating competence outcome)*	▶**Demonstration:** Product will include four parts: (1) a written report the describing the skill of formation of various types of budgets and dashboards and, their various applications, and how to construct them (2) a example (real case example if acceptable to client) of a budget and dashboard demonstrating my ability, including a written budget guide for clinical health care managers; (3) a brief self-assessment of my ability in relation to the criteria previously described; and, (4) a bibliography (APA citation format) of resources explored pertaining to such.
(4) Assessor *(anticipated)*	- TBD
(5) Schedule *(anticipated)*	-TBD

Name: Miler, Marilyn **DePaul #:** XXXXXX **Cluster #:** XX **Date:** for later use

• Professional Competence AP-540 •

Ability to engage COMMUNICATION MODES appropriate to the Focus Area

"can describe and demonstrate communication skill (or set of skills) relevant to a particular context in the focus area."

DESCRIPTION of AP-540 (2 cr hrs): This area involves facility with communication modes relevant to professional practice in the focus area. It requires an understanding of the relationship among key communication variables (the message, the method, the audience and the context), a repertoire of communication strategies, and a dexterity or ease of access permitting the professional to adapt communication strategies to changing situations as necessary. Successful demonstration of competence in this area includes:

(a) Selection of appropriate method(s) of communication in relation to the context (audience and environment) in which the communication will occur; and,

(b) Application of skills at a level appropriate to both professional contribution & graduate study.

PLAN for AP-540	
(1) Competence Statement *(competence outcome)*	▶**Outcome:** Can describe and demonstrate the communication skill/mode mediation of as it is practiced in my focus area.
(2) Learning ACTIVITIES *(means to accomplish competence outcome)*	▶**Activities:**. DePaul University Mediation Certification Program (see 'Appendix for AP-540') ▶**Initial Literature:** per program
(3) Learning PRODUCT(s) *(evidence demonstrating competence outcome)*	▶**Demonstration:** receipt of certificate
(4) Assessor *(anticipated)*	-Seminar leaders (DePaul School of Law)
(5) Schedule *(anticipated)*	-Winter Quarter of 2011

Name: XXX XXX **DePaul #:** XXXXXX **Cluster #:** XX **Date:** for later use

• Professional Competence AP-550 •

Ability to understand the ORGANIZATIONAL and/or INTERPERSONAL DYNAMICS within which practitioners in the Focus Area define their roles and fulfill their responsibilities.

"can describe and analyze organizational and/or interpersonal dynamics inherent within professional practice in the focus area."

DESCRIPTION of AP-550 (2 cr hrs): This area addresses the human and structural issues that professionals encounter within practice (work) environments. It provides an opportunity for students to consider how their professional role affects and is affected by systems, technology, structure, and other people within their practice settings. Successful demonstration of competence in this area includes:

(a) Identification of relevant dynamics (e.g., open/closed systems, power, trust, culture, conflict, diversity, gender, communication, change, impact of technology, etc.); and,
(b) Description and analysis of particular dynamics in relation to their impact on professional practice and vice versa.

PLAN for AP-550	
(1) Competence Statement *(competence outcome)*	▶**Outcome:** Can describe and analyze organizational behavior concepts at the individual, group and organizational level as such impacts my focus area.
(2) Learning ACTIVITIES *(means to accomplish competence outcome)*	▶**Activities:** ***DePaul course MGT 500 Effective and Ethical Organizational Behavior***--Students will critically examine ethical and creative methods to solve problems related to managing individuals and teams. Students utilize feedback from a developmental assessment center assessing their managerial and interpersonal skills. Personal development plans are created and skills developed throughout the course. Skill development domains include perception, attribution, motivation, learning leadership, communication, team development, managing change and conflict, decision-making, power and politics and business ethics. (See 'Appendix for AP-550/570' for syllabus) ▶**Initial Literature:** Per course.
(3) Learning PRODUCT(s) *(evidence demonstrating competence outcome)*	▶**Demonstration:** Course completion and grade.
(4) Assessor *(anticipated)*	-Course professor
(5) Schedule *(anticipated)*	-Spring Quarter of 2010

Name: XXX XXX **DePaul #:** XXXXXX **Cluster #:** XX **Date:** for later use

• Professional Competence AP-560 •

Ability to interpret CHALLENGES FROM LARGER CONTEXTS facing the Focus Area.

"can describe and analyze challenges from the larger context facing the focus area—including implications for professional practice."

DESCRIPTION of AP-560 (2 cr hrs): This area addresses the ability to see the profession (including its issues and problems) within a context that includes at least one of the following aspects: the temporal (historical development and future directions of the profession); the social/cultural (relationship of the profession to its societal context); and, the international (the state of the profession globally). Successful demonstration of competence in this area includes:
(a) Identification of significant challenges facing practitioners in the profession; and,
(b) Analysis of selected challenges within a framework that emphasizes one or more aspects listed above (temporal, social/cultural, or international).

PLAN for AP-560	
(1) Competence Statement *(competence outcome)*	▶**Outcome:** Can describe and analyze the challenge of quality improvement and risk management (including implications for professional practice) as such impacts my focus area.
(2) Learning ACTIVITIES *(means to accomplish competence outcome)*	▶**Activities:** ***Ashford University course MHA 624 Continuous Quality Improvements & Risk Management.*** This course examines a systemic approach to health care outcomes and risk management practices. Assurance of quality health services and organizational risk control is discussed using industry benchmark and accreditation standards and processes.(See 'Appendix for AP-560' for course objectives; mentor has full copy of syllabus on file) ▶**Initial Literature:** per course
(3) Learning PRODUCT(s) *(evidence demonstrating competence outcome)*	▶**Demonstration:** course grade
(4) Assessor *(anticipated)*	-course professor
(5) Schedule *(anticipated)*	-TBD

Name: XXX XXX **DePaul #:** XXXXXX **Cluster #:** XX **Date:** for later use

• Professional Competence AP-570 •

Ability to analyze ETHICAL ISSUES involved within the Focus Area.

"can describe and analyze ethical issues impacting the focus area—including implications for professional practice."

DESCRIPTION of AP-570 (2 cr hrs): This area addresses the relationship between beliefs and assumptions regarding humanity, good/evil, right/wrong, etc., and behavioral outcomes (including conflicts). Successful demonstration of competence in this area includes:
(a) Identification of significant problems, dilemmas, or circumstances in the focus area requiring ethical decision-making and the determination of an appropriate response;
(b) Ability to analyze problems and propose solutions using various philosophical frameworks or constructs.

PLAN for AP-570	
(1) Competence Statement *(competence outcome)*	▶**Outcome:** Can describe and analyze ethical frameworks and apply them to organizational behavior concepts to solve real organizational problems associated with my focus area.
(2) Learning ACTIVITIES *(means to accomplish competence outcome)*	▶**Activities:** ***DePaul University MGT 500 MGT Effective and Ethical Organizational Behavior***. Students will critically examine ethical and creative methods to solve problems related to managing individuals and teams. Students utilize feedback from a developmental assessment center assessing their managerial and interpersonal skills. Personal development plans are created and skills developed throughout the course. Skill development domains include perception, attribution, motivation, learning leadership, communication, team development, managing change and conflict, decision-making, power and politics and business ethics. (See 'Appendix for 550/570' for syllabus) ▶**Initial Literature:** per course
(3) Learning PRODUCT(s) *(evidence demonstrating competence outcome)*	▶**Demonstration:** course grade
(4) Assessor *(anticipated)*	-Course professor
(5) Schedule *(anticipated)*	-Spring Quarter of 2010.

Name: XXX XXX **DePaul #:** XXXXXX **Cluster #:** XX **Date:** for later use

• Professional Competence AP-574 •

Ability to engage REFLECTION ON/IN PRACTICE in the Focus Area

"can describe and analyze approaches to reflection and apply such to a particular personal situation involving one's professional practice."

DESCRIPTION of AP-574 (2 cr hrs): This area addresses the interplay between and among thinking, doing and reflecting in the often-ambiguous and complex contexts of daily practice. Whereas action provides for the practice of ideas, reflection allows for the creation of new ways of mentally organizing ideas in order to find additional possibilities (e.g., new ideas, new perspectives, new choices, new understanding of continuing choices, etc.) to inform future action. Successful demonstration of competence in this area includes:

(a) Identification of various approaches to reflection (e.g., experiential learning, transformative learning, emancipatory learning, mindfulness, meditation, contemplation, journaling, after action review, etc.); and,

(b) Ability to analyze one's own experience through reflection.

PLAN for AP-574	
(1) Competence Statement *(competence outcome)*	▶**Outcome:** Can describe and analyze memoing/self-reflective journaling as a method of reflection and apply such to a situation of my personal/professional practice.
(2) Learning ACTIVITIES *(means to accomplish competence outcome)*	▶**Activities:** Directed independent study of the application of memoing/self-reflective journaling ▶**Initial Literature:** "Teaching Ethics through Self-Reflective Journaling," by Swindell & Watson. Journal of Social Work Values and Ethics, 3(2), 2006 "A three-step method of self-reflection using reflective journal writing," by Riley-Coucet & Wilson. Journal of Advanced Nursing, May 25, 1997. "Field Notes and Theoretical Memos in Grounded Theory," by Montgomery and Bailey, Western Journal of Nursing Research, 29(1), 2007. "Memoing in Qualitative Research: Probing data and processes," by Birks, et al., Journal of Research in Nursing, 13(1), 2008.
(3) Learning PRODUCT(s) *(evidence demonstrating competence outcome)*	▶**Demonstration:** Product will include three parts: (1) a written report describing the role and process of memoing/ self-reflective journaling; (2) an explanation (with a few examples) of my own experience applying this method to a particular professional situation; and, (3) a bibliography (APA citation format) of resources explored pertaining to such
(4) Assessor *(anticipated)*	- PA
(5) Schedule *(anticipated)*	-TBD

Name: XXX XXX **DePaul #:** XXXXXX **Cluster #:** XX **Date:** for later use

• Professional Competence AP-585 •
(Supplemental Competence I)

DESCRIPTION of AP-585 (2 cr hrs): This area addresses knowledge and understanding of theories, models and/or theoretical frameworks—including their implications for practice—relevant to the Focus Area. In areas where theories are not well established (e.g., emerging fields of study or in unique combinations of fields), this area includes exploration of theories in related fields. As the student addresses contemporary theories, he/she should be familiar with their relationship to theoretical traditions. Successful demonstration of competence in this area includes:
(a) Knowledge of the differences among the terms—theory, concept, principle and model;
(b) Ability to analyze (compare, contrast, critique—not merely describe or react to) theories or their counterparts including their application to practice.

PLAN for AP-585	
(1) Competence Statement *(competence outcome)*	▶**Outcome:**. Can describe and analyze major theoretical orientations/perspectives in the field of gerontology and evaluate their implications for practice of business operations enhancement for providers of eldercare services.
(2) Learning ACTIVITIES *(means to accomplish competence outcome)*	▶**Activities:** Independent study of the field of gerontology--an overview of the biological, psychological, and sociological processes associated with aging. An emphasis will be placed on learning the major theoretical perspectives pertaining to gerontology. ▶**Initial Literature:** See 'Appendix for AP-585'
(3) Learning PRODUCT(s) *(evidence demonstrating competence outcome)*	▶**Demonstration:** Product will include two parts: (1) a written report describing and analyzing major theoretical orientations/perspectives in the field of gerontology and evaluate their implications for practice of business operations enhancement for providers of eldercare services; and, (2) a bibliography (APA citation format) of resources explored pertaining to such.
(4) Assessor *(anticipated)*	- PA
(5) Schedule *(anticipated)*	-TBD

▶ PART VI: Plans for Culmination

Directions: In Part VI, the student is to identify which of the two Culmination Options he/she is currently considering and, regarding such, with what possible focus per option chosen. To be sure, Part VI's plans are held as *tentative—pending further evolution and refinement as study in the Focus Area progresses*. As possible, the student is encouraged to identify his/her Culmination Option as early as possible in order to integrate all aspects of the Program together and, most directly, use the earlier parts of the program to build toward the latter. (For a fuller description of Culmination Options, see HANDBOOK SECTION V.)

At this point, I'm leaning toward… *(Please check one and elaborate.)*

_XX_ **Option A—Four Supplemental Competencies** ***(2 cr hrs each)***
[AP-586, AP-587, AP-588, AP-589]

Additional areas I am currently considering to pursue through the four supplemental competencies include:
-Managed care, healthcare payers
-Senior living options
-Health economics
-contemplation
-LEAN six-sigma as applicable to healthcare providers
-organizational development and change
-additional ethical perspectives (beyond LLS course and AP-570)
-AAR (After Action Review)
-a second competence derived from MHA 618 (used in AP-510)
-a second competence derived from EA 525 (used in AP-520)
-a second competence derived from MHA 624 (used in AP-560)

Name: XXX XXX **DePaul #:** XXXXXX **Cluster #:** XX **Date:** for later use

• Professional Competence AP-586 •

(Supplemental Competence II)

DESCRIPTION of AP-586 (2 cr hrs): This area addresses the human and structural issues that professionals encounter within practice (work) environments. It provides an opportunity for students to consider how their professional role affects and is affected by systems, technology, structure, and other people within their practice settings. Successful demonstration of competence in this area includes:

(a) Identification of relevant dynamics (e.g., open/closed systems, power, trust, culture, conflict, diversity, gender, communication, change, impact of technology, etc.); and,

(b) Description and analysis of particular dynamics in relation to their impact on professional practice and vice versa.

PLAN for AP-586	
(1) Competence Statement *(competence outcome)*	▶**Outcome:** -Can describe and analyze the role of managed care, reimbursement , and prospective payment as it relates to organizations that provide services to the elderly, including Medicare, Medicaid, private insurance
(2) Learning ACTIVITIES *(means to accomplish competence outcome)*	▶**Activities**: Independent research ▶**Initial Literature:** HFMA courses, as listed in 'Appendix for AP-586' (certification review) Medicare Prospective Payment and the Shaping of U.S. Health Care, by Rick Mays Medicare: A Policy Primer, by Marilyn Moon Making Them Pay: How to Get the Most from Health Insurance and Managed Care, by Rhonda Orin
(3) Learning PRODUCT(s) *(evidence demonstrating competence outcome)*	▶**Demonstration**: Product will include three parts: (1) a written report describing and the role of managed care and reimbursement as it relates to organizations that provide services to the elderly; (2) Certification from HFMA and, (3) a bibliography (APA citation format) of resources explored pertaining to such.
(4) Assessor *(anticipated)*	-TBD
(5) Schedule *(anticipated)*	-TBD

Name: XXX XXX **DePaul #:** XXXXXX **Cluster #:** XX **Date:** for later use

• Professional Competence AP-587 •
(Supplemental Competence III)

DESCRIPTION of AP-587 (2 cr hrs): This area addresses the ability to see the profession (including its issues and problems) within a context that includes at least one of the following aspects: the temporal (historical development and future directions of the profession); the social/cultural (relationship of the profession to its societal context); and, the international (the state of the profession globally). Successful demonstration of competence in this area includes:
(a) Identification of significant challenges facing practitioners in the profession; and,
(b) Analysis of selected challenges within a framework that emphasizes one or more aspects listed above (temporal, social/cultural, or international).

PLAN for AP-587	
(1) Competence Statement *(competence outcome)*	▶**Outcome:** Can describe and analyze senior living options (AL, IL, CRCC, home care, co-ops) as it relates to organizations providing healthcare services to the elderly.
(2) Learning ACTIVITIES *(means to accomplish competence outcome)*	▶**Activities:** Independent research ▶**Initial Literature:** Handbook of Social Work in Health and Aging, ed B Berkman Making the Right Move: Housing Options for Seniors, by G Telford Analyzing Seniors' Housing Markets, by S Brecht
(3) Learning PRODUCT(s) *(evidence demonstrating competence outcome)*	▶**Demonstration:** Product will include two parts: (1) a written report describing and the health/biological-related implications of aging and the demography of the aging population; and, (2) a bibliography (APA citation format) of resources explored pertaining to such.
(4) Assessor *(anticipated)*	- PA
(5) Schedule *(anticipated)*	-TBD

Name: XXX XXX **DePaul #:** XXXXXX **Cluster #:** XX **Date:** for later use

• Professional Competence AP-588 •

(Supplemental Competence IV)

Ability to interpret CHALLENGES FROM LARGER CONTEXTS facing the Focus Area.

"can describe and analyze challenges from the larger context facing the focus area—including implications for professional practice."

DESCRIPTION of AP-588 (2 cr hrs): This area addresses the ability to see the profession (including its issues and problems) within a context that includes at least one of the following aspects: the temporal (historical development and future directions of the profession); the social/cultural (relationship of the profession to its societal context); and, the international (the state of the profession globally). Successful demonstration of competence in this area includes:

(a) Identification of significant challenges facing practitioners in the profession; and,

(b) Analysis of selected challenges within a framework that emphasizes one or more of aspects listed above (temporal, social/cultural, or international).

PLAN for AP-588	
(1) Competence Statement *(competence outcome)*	▶**Outcome:** Can describe and analyze the challenge of human resource management & employment law/government regulations (including implications for professional practice) as such impacts my focus area.
(2) Learning ACTIVITIES *(means to accomplish competence outcome)*	▶**Activities:** Essentials of Human Resource Management certificate program DePaul University, see 'Appendix for AP-588' ▶**Initial Literature:** Arthur, Diane. Managing Human Resources in Small & Mid-Sized Companies, 2nd ed. American Management Association, 1995. Fottler, Myron, et al. Essentials of Human Resources Management in Health Services Organizations. Delmar Publishers, 1998. Barbeito, Carol. Human Resources Policies and Procedures for Nonprofit Organizations.
(3) Learning PRODUCT(s) *(evidence demonstrating competence outcome)*	▶**Demonstration:** Product will include two parts: (1) a written report describing and analyzing the dynamic of the challenge of human resource management & employment law/government regulations as applicable to organizations that provide services to the elderly; (2) a bibliography (APA citation format) of resources explored pertaining to such.
(4) Assessor *(anticipated)*	-TBD
(5) Schedule *(anticipated)*	-TBD

Name: XXX XXX **DePaul #:** XXXXXX **Cluster #:** XX **Date:** for later use

• Professional Competence AP-589 •

(Supplemental Competence V)

DESCRIPTION of AP-589 (2 cr hrs): TBD

PLAN for AP-589	
(1) Competence Statement *(competence outcome)*	▶**Outcome:** - TBD
(2) Learning ACTIVITIES *(means to accomplish competence outcome)*	▶**Activities:** TBD ▶**Initial Literature:** TBD
(3) Learning PRODUCT(s) *(evidence demonstrating competence outcome)*	▶**Demonstration:** TBD
(4) Assessor *(anticipated)*	-TBD
(5) Schedule *(anticipated)*	-TBD

▶PART VII: Professional Advisor & Working Relationship

Directions: In Part VII, the student addresses the matter of his/her Professional Advisor (PA). (For a fuller description of the role of the PA, see HANDBOOK SECTION II. Specifically, Part VII is to include a brief description of the following:

A. What led the student to nominate the particular PA. (See HANDBOOK SECTION II for PA qualifications.)
B. What the student hopes for regarding the nature of the relationship with the PA;
C. What the student believes he/she (the student) brings to that relationship; and,
D. An initial plan for interaction between the student and the PA (e.g., frequency, method, etc.)

[NOTE: Early in the process, these four areas will be addressed in terms of PLANS in general. Once the PA is approved, the content of these areas should be updated more specifically in relation to the particular PA.]

A. Rationale/criteria for nominating specific PA:

↳**What led you to nominate the particular PA you nominated? (e.g., qualities? commitments? education? field of practice? position in field? etc.)**

I have nominated XXXX X XXXX to serve as my Professional Advisor. XXX has a strong clinical background in social work, specializing in the elderly. XXX holds a MSW and in a doctoral student at Columbia University School of Social Work. XXX has an extensive and background in consulting and academics. He is active in a number of eldercare organizations and has authored a number of articles and contributions to books, as well as presented at conferences and professional organizations.

XXX is a doctoral student studying with one of the most prominent researchers in the area of gerontological social work—Dr. XXX XXX. His area of specialization is dementia, which fits well with the clinical side of my learning plan. He has a good background and understanding of all areas of eldercare issues, having been an advocate for the elderly.

B. What I hope for regarding the "Student—PA" relationship:

↳**Describe the "working/learning relationship" you hope to build with your Professional Advisor.**

I believe that a good relationship with my PA begins with openness—being straightforward with goals, expectations, and providing feedback and asking for help as needed. In addition, frequent communication, keeping the PA updated, and the PA keeping me advised of his/her opinions and evaluation of my work and work habits is important. I also would want the PA to guide me to networking opportunities, community involvement activities as related to my focus area, and learning activities, even if they do not directly apply to my learning plan.

C. What I bring to the "Student—PA" relationship:

↳**What do you believe you bring to the "working/learning relationship" you hope to build with your Professional Advisor?**

I bring an enthusiasm and dedication for my subject matter, an eagerness to learn, openness to suggestion and criticism, willingness to give feedback and ask questions, and flexibility with my time and my learning plan. I also will look for opportunities to enhance the working and learning experience for both XXX and myself. I agree to bring to the PA relationship open-mindedness, a strong work ethic, honesty, willingness to communicate, openness with my plans, goals, progress and problems. I plan to use the class guidelines regarding honesty, communication, etc. in the PA relationship. I also will be flexible and accommodating, with the understanding that the PA has other obligations in life besides my learning plan and me.

Because XXX is extremely busy with his own education and work, I am particularly mindful that I will need to be adaptable and organized so that we make the most of our time.

D. Initial Plan for "Interaction Process" between Student & PA:

↳**Describe the interaction plan you have discussed with your PA (frequency of contact, method of contact, etc.).**

I would hope and expect to be in contact with my PA minimally at least once per month during quarters in which I'm working on competencies, including breaks. Methods of communication that would be suitable include phone calls and email, and, if logistically convenient, in-person meetings. My plan is to keep the PA updated with my progress both within courses and across the learning plan. If my schedule changes, I will notify him with revised plans. I don't intend to have XXX micromanage my progress, so we will discuss exactly how much detail he prefers. I have no problem with adjusting to his preferences.

I will update XXX at the end of every term, upon completion of my competencies, and share with him my learning product for competencies for which he is not the evaluator. I will be interested in any additional feedback he will provide.

Appendix for AP-510

Ashford University Course MHA 618 course objectives:

Learning Outcomes

➢ Upon successful completion of this course, students will be able to:

1. Compare and contrast healthcare's organized delivery systems.
2. Analyze labor and employment laws impacting healthcare organizations.
3. Analyze the relationship of healthcare entrepreneurship and healthcare leadership.
4. Evaluate alternative models of healthcare organizations and the administrative leadership role.
5. Analyze healthcare's compensation models.
6. Demonstrate healthcare strategic planning as a collaborative effort among the major stakeholders.
7. Apply leadership strategies to practical healthcare situations; develop realistic solution(s) to reform the healthcare system.

Appendix for AP-530

Initial Literature:

Strategic Management of Health Care Organizations by Linda E. Swayne, W. Jack Duncan, and Peter M. Ginter

Fundamentals of Health Care Financial Management: A Practical Guide to Fiscal Issues and Activities by Steven Berger

Accounting Fundamentals for Health Care Management by Steven Finkler

Guide to Long Term Care Financial Management by Karen Stevenson Brown

Financial Management of Health Care Organizations - An Introduction to Fundamental Tools, Concepts and Applications (Josseybass) by Zelman, McCue, and Glick

Budgeting Concepts for Nurse Managers by Steven A. Finkler PhD CPA and Mary McHugh

Appendix for AP-540

I am proposing to use the following non-credit bearing event/program as both Learning activity and learning product in association with Competence #AP 540

Proposing to use as a learning activity:
Name of Program:
Mediation Training Certificate Course
Purpose of event/program:
To teach professionals the skill of the communication technique of mediation
Length of event/program:
Approximately 40 classroom hours
Brief overview of event/program:
See below
Contact information for event/program:
gkutschk@depaul.edu, kdutenha@depaul.edu

Proposing to use as a learning product:
Description of product/learning produces through event/program:
Skill of mediation as a form of communication relevant to my focus area of organizational enhancement
Description of how product/learning is assessed through event/program:
Individual coaching
Does program/event result in certificate? If so, organization granting certificate:
Yes, DePaul University Center for Dispute Resolution
Is program/event affiliated with accredited university:
Yes, DePaul University
Reason why/how you think this product/learning is graduate level:
The program is directed toward professionals with advanced degrees and the program is taught by attorneys.

Additional Program Information:

DePaul University

Professional Programs For Attorneys & Professionals

Participants in the Certificate Training Courses include:

- Attorneys in private practice
- Corporate counsel
- Judges
- Leaders in governmental agencies
- Executives and managers in corporations
- Human resource professionals
- Owners and managers of small and closely-held businesses
- Insurance managers and claims adjusters
- Securities brokers
- Physicians, clergy, social workers, psychologists
- Mediators & arbitrators

- Administrators of educational health-care and religious institutions
- Consultants
- Service providers
- Other professionals

Advantages of the DePaul Certificate Training Courses:

EXPERIENCE:
The Center for Dispute Resolution has conducted certificate training courses since 1996.

AVAILABILITY:
Courses are offered multiple times each year on weekdays, evenings and Saturdays.

FACULTY:
All instructors are attorneys with extensive experience in the practice of law and are advocates and neutrals in the field of alternative dispute resolution.

COACHING:
In the Mediation Training Certificate Course each participant receives one-on-one coaching from experienced mediators/coaches.

CONTINUING LEGAL EDUCATION:
DePaul University College of Law has been designated a Certified Provider by the Illinois Minimum Continuing Legal Education (MCLE) Board of the Illinois Supreme Court. Each course is approved for **MCLE CREDIT**.

The Illinois Commission on Professionalism has approved each course for **four hours** of **PROFESSIONALISM CREDIT**.

Attorneys interested in similar approval for certification from other jurisdictions should notify the Center for Dispute Resolution's coordinator at gkutschk@depaul.edu, or director at kdutenha@depaul.edu, and the necessary materials will be submitted.

CONTINUING EDUCATION REQUIREMENTS:
Participants interested in continuing education credits should notify the Center for Dispute Resolution's coordinator at gkutschk@depaul.edu, or the director at kdutenha@depaul.edu, and the necessary materials will be submitted.

Appendix for AP-550 & AP-570

Sample course syllabus:

MGT 500: Effective & Ethical Organizational Behavior DePaul University – Kellstadt Graduate School of Business Course Syllabus for AQ09

Instructor: Robert S. Rubin, Ph.D. **Office:** 7036 DePaul Center
Course Materials
Required Readings: Posted to the course blackboard
Assessment Center: $58 cost to participate. See course schedule and project description.
Supplemental Material: Cases and exercises supplied by the instructor.
General Course Learning Goals
(See specific learning objectives on back pages)
This course is a survey of organizational behavior intended to develop your knowledge and skills in the application of organizational behavior concepts at the individual, group and organizational level. Part of this requires an experiential examination of management and organizational behavior concepts. By the end of this class you should be able to:
 articulate the major theories, principles and concepts in organizational behavior. apply ethical frameworks to organizational behavior concepts to solve real organizational problems. use organizational behavior tools/concepts to diagnose and improve your own management skills.
Course Expectations and Educational Philosophy
Attendance: It will be difficult to do well in the course without regular attendance. Class attendance is expected for both student and instructor. You will not be penalized *per se* if you miss class; however, missing lectures and activities may adversely impact your performance. Thus, it is in your best interest to attend class. **Attendance is required for all class presentations and/or guest lecturers. Unexcused absences will result in a 5-point deduction from your final grade.**
Course Projects and Assessment
Your final grade in the course will be based on a total of **185 points**, consisting of the following requirements:
1. **Midterm and Final Exams (Knowledge Assessments - 50 Points each)** - There will be a total of 2 exams that are intended to measure your knowledge of organizational behavior theory and concepts, and practices. **Both exams will be open notes/materials and administered online through Blackboard**.
2. In-Class "Labs" (20 Points) – We will use the class as an active laboratory for self-discovery and exploration of OB topics and skills. For several weekly topics, there is an

associated activity (i.e., readings, internet assignment etc.) that is due the day of class (see course schedule). These are designed to be short, yet illustrative, examples of OB applications and generally require you to answer a few questions. There will be multiple in-class “labs” that will require you to solve problems, reflect on readings, follow up on assignments or participate in group activities. For instance, you might be given in-class writing assignments to answer questions from the readings. Or, you may be asked to practice a skill that we have discussed. If you are keeping up with your readings/assignments and coming to class, these are easy points and are generally based on completeness.

<u>Individual Development Plan (IDP</u>*)* (40 points) – You will participate in an assessment center designed to assess various interpersonal skills associated with effective management such as teamwork, planning, decision making, and communication. Based on feedback from the assessment center, you will create an individual development plan that targets key behaviors for improvement. The IDP will consist of setting 1 to 2 behavioral goals for improvement and creating an action plan for accomplishing the goal(s). The IDP *should not exceed 2 pages (not counting tables, notes, etc.)*. There will be a $58.00 fee associated with the assessment center that is payable directly to the consulting firm that administers the activity (Academic Behavior Assessment). During the first week of the quarter, you will be sent an email that outlines the specific sign-up and payment processes. There will be multiple assessment center administrations (i.e., dates/times) from which you may choose.

<u>Case Write-up</u> (20 Points) – You will read two case studies in this class. These cases represent difficult OB-related situations often faced by managers. This project requires that **you formally respond to the questions provided for *one of these cases***. Thus, there will be two cases posted, of which you will *choose one to complete* and turn in at designated times during the quarter (see course schedule).

<u>Management 500 Course Learning Objectives</u>

This course specifically addresses three major DePaul University *College of Commerce* learning goals:

- **Teamwork and Leadership Skills**
- **Communication Skills**
- **Ethical Awareness**

Based on these broad goal domains, the following specific learning objectives are measured through the assessments described in the course syllabus. Some objectives are assessed via multiple course requirements.

<u>Week 1: Introduction to OB</u>

Differentiate between three levels of analysis in organizational behavior.

Describe important organizational outcomes typically studied in organizational behavior.

Explain how research is conducted in organizational behavior.

Define the terms: theory, hypothesis, and construct.

Articulate a well thought-out case for the importance of organizational behavior in organizations.

Explain the benefits of adopting an evidence-based rather than "common sense" approach to managing organizational behavior.
Articulate a reasoned case for examining ethics in organizational behavior.
Differentiate between Big E evidence and Little e evidence.

Week 2: Individual Differences

Explain the role of individual differences in explaining and predicting behavior.
Describe the various elements of personality.
Describe situations in which using personality would be considered unethical or inappropriate.
Improve self-awareness by describing your personality preferences using the MBTI and BIG 5 measures.
Explain the relationship between cognitive ability and performance for managerial jobs.
Explain the relationship between personality factors and important job related outcomes.
Describe the attitude-behavior relationship and why attitudes are often poor predictors of behavior.

Week 3: Judgment & Ethical Problem Solving

Explain the ladder of inference process of perception and attribution.
Explain the implications of the fundamental attribution error and self-serving bias for mangers.
Discuss the idea of impression management.
Apply a model for effective ethical decision making/problem solving.
Explain the concept of "right versus right" in ethical decision making.
Describe the perceptual traps involved in decision making.
Describe dimensions of moral intensity.

Week 4: Learning & Communication

Differentiate between three types of conversation frames.
Explain why balancing advocacy and inquiry is an effective method for communicating.
Define the terms undiscussables, espoused theories/theories in use, defensive reasoning and double-loop learning.
Improve your own communication skills by learning to diagnose your own unproductive conversations.
Demonstrate knowledge of techniques for delivering high quality feedback.
Contrast the expert and consultative approaches to coaching.

Week 5: Motivation

Recommend methods for increasing motivation using the job characteristics model.
Discuss the influence of needs on motivation and managerial effectiveness.
Describe the key elements involved in creating an effective reward system.
Describe the key elements in goal setting theory.
Demonstrate ability to set SMART goals appropriately.
Contrast the concepts of intrinsic and extrinsic motivation.

Week 6: Power, Influence, Conflict

Describe how the five bases of power influence employee commitment, internalization and identification.

Differentiate between power, social influence and politics.
Discuss categories of power/influence tactics that are likely to be more or less effective in eliciting employee commitment, compliance and resistance.
Describe Cialdini's six techniques/weapons of social influence.
Articulate the relationship between team conflict and team satisfaction and performance.

Week 7: Organizational Justice and Ethics

Differentiate between the three different forms of organizational justice.
Articulate methods for improving justice perceptions.
Apply justice perspectives to ethical decision-making

Week 8: Teams

Discuss the reasons associated with performance losses in teams.
Discuss the reasons associated with decision failures in teams.
Differentiate between a work-group and a team.
Recommend methods for sustaining team success.
Define the Abilene paradox and **discuss** why it occurs.

Week 9: Ethical Leadership

Describe how the various leadership theories fit together.
Differentiate between leaders and managers.
Contrast traditional leadership with the "new leadership."
Explain the full range of leadership model and describe associated outcomes.
Define the role of charisma in leadership effectiveness.
Describe the significant factors that influence trust in leadership.
Explain the implications of leader-member exchange theory for managers.
Describe the key elements of ethical leadership behavior.
Describe the relationship between transactional behaviors and transformational behavior.

Week 10: Culture, Change, & Consultation

Define the basic functions of organizational culture.
Articulate the key factors associated with ethical cultures/climates.
Explain how culture is communicated to employees.
Differentiate between the three models of organizational consultation and **articulate** the potential problems with each.
Describe the potential ethical issues consultants face.
Describe a consultant's primary role in organizations.

Appendix for AP-560

Ashford University MHA 624 Course Objectives:

Course Design

This course focuses on the principles and fundamentals quality improvement, risk management, and patient safety meeting the following Master of Arts in Healthcare Administration program objectives:

- Formulate healthcare decisions consistent with legal and ethical standards.
- Utilize healthcare information technology and statistical reasoning in organizational planning and decision-making.
- Demonstrate sensitivity to diversity in the healthcare setting.
- Evaluate healthcare outcomes using quality improvement and risk standards.
- Apply healthcare economic perspectives in the interpretation of health policy.
- Apply problem-solving approaches in the resolution of healthcare issues.
- Communicate the responsibility of a healthcare professional remaining current in their professional knowledge.

Learning Outcomes

➢ Upon successful completion of this course, students will be able to:

1. Apply principles of quality improvement in the healthcare environment.
2. Design a systems approach to healthcare outcomes management.
3. Analyze the effect of social, cultural, and political issues in the provision of healthcare services.
4. Recognize healthcare professional and stakeholder implications in total quality management.
5. Analyze health policy, reimbursement and regulatory requirements that impact total quality.
6. Assess legal, ethical and risk management factors in total quality improvement.
7. Analyze quality improvement data using statistical methodologies.
8. Select appropriate strategies for administering the quality improvement processes.

APPENDIX for AP-585

Gerontology initial literature:

Handbook of Social Work in Health and Aging, ed. B Berkman

Making the Right Move: Housing Options for Seniors, by G Telford

Analyzing Seniors' Housing Markets, by S. Brecht

Social Gerontology, by N. Hooyman and H. Kiyak

The Sociology of Aging, by D. Harris

Gerontology: Perspectives and Issues, J. Wilmoth and K. Ferraro eds.

Social Gerontology, by Hooeyman, et al.

Emergent Theories of Aging, by James Birren and Vern Bengtson

The Demography of Aging, by Sam Preston and Linda Martin

Social Work with Elders, by Kathleen McInnis-Dittrich

Social Work and Health Care in an Aging Society, by B Berkman (ed)

Appendix for AP-586

I am proposing to use the following non-credit bearing event/program as a learning activity in association with Competence #AP 586:

Proposing to use as a learning activity:
Name of Program:
Healthcare Financial Management Assn. online courses
Purpose of event/program:
To teach medicare billing, managed care, and compliance
Length of event/program:
Approximately 22 hours
Brief overview of event/program:
See below
Contact information for event/program:
support@mcstrategies.com, 800-252-4362 x 310

HFMA Billing - Basics of Medicare Billing

This 14 lesson introductory course contains material on Medicare Billing including the CMS-1450 (UB-04), CMS-1500, Medicare as Secondary Payor and more. Each lesson takes approximately 15 minutes to complete and a Certificate of Completion is available upon successful completion of each lesson.

The UB-04 Billing Form, parts 1-5 These lessons provide information on the various fields on the UB-04 (CMS-1450) form and how to complete them.

CMS 1500, 08/05 Version, parts 1-3 These lessons provide staff with the information necessary to understand the items and terms used in the 08/05 revised version of the HCFA 1500 billing form.

Medical Records - This lesson provides staff with information about the Medical Records department (Health Information Management, HIM) and how it interacts with the Patient Accounts Department.

Medicare as Secondary Payer, parts 1-2 - These lessons provide staff with guidance on how and when to identify Medicare as the secondary payer, the importance of accurate identification of Medicare as the primary or secondary payer and how to bill secondary claims to the Medicare program.

Medicare Advantage Plans - This lesson provides staff with a basic understanding of Medicare Advantage plans.

Covering Medicare Deductibles: Medigap, Medicaid Secondary to Medicare, Medicare HMOs - This lesson provides staff with a basic understanding of Medicare deductibles, co-insurance and the various types of insurance plans that are available to cover these costs.

Where to Find Information on the Internet - This lesson provides staff with guidance on how and where to find Medicare regulations, requirements, billing, and claims processing, coverage and available materials necessary to complete the billing and claim submission process. The URLs in this lesson may not be the most direct way to access specific information, but are used to provide the user with the basic information to become familiar with the various CMS websites.

HFMA Managed Care
This course consists of 47 lessons in 9 major topic areas. The information in these lessons was derived from HFMA's Certified Healthcare Financial Professional (CHFP) Study Manual. Major topic areas covered are: Overview of managed care, Healthcare delivery system, Financial management, Managed care operations, Contracting and negotiating, Medical management, Regulation and accreditation, and Medicare and Medicaid. Each lesson takes approximately 15 minutes to complete and a certification of completion is available upon the successful completion of each lesson.

Overview of Managed Care (4 Lessons)
Lesson topics include: The Evolution of Managed Care, Policy and Performance Issues, The Problem of the Uninsured, Other Nations' Health Care Systems

Healthcare Delivery System (6 Lessons)
Lesson topics include: Managed Care Models, Cost Sharing, Reinsurance Recovery and Coordination of Benefits, Claims Management and Processing, and Tiered Networks and Pricing

Financial Management (12 Lessons)
Lesson topics included: Financial Management, Hospital Reimbursement Methodologies, Professional Reimbursement Methodologies, Aligning Incentives, Underwriting and Reinsurance, Community Rating, Experience Rating and Risk Relationships

Managed Care Operations (4 Lessons)
Lesson topics include: Provider and Payer Managed Care Operations and Claims Administration

Contracting and Negotiating (6 Lessons)
Lesson topics include: How to Evaluate a Contract, High-Risk Areas in Contracting, Contract Provisions, and Direct Contracting

Medical Management (3 Lessons)
Lesson topics include: Case Management, Utilization Management and Management of Patient Care

Regulation and Accreditation (5 Lessons)
Lesson topics include: Regulation and Accreditation, Privacy and Electronic Health Records, Prompt Payment Regulations, COBRA and HMO Solvency

Forces Driving State and Federal Health Policy (2 Lessons)
Lesson topics include: Forces Driving Healthcare Policy and Consumer-Driven Healthcare Plans

Medicare and Medicaid (5 Lessons)
Lesson topics include: Medicare History, Patient Rights and Medicaid

HFMA Compliance: Coding, Billing & Reimbursement

This 23 lesson course covers compliance topics related to coding, billing and reimbursement including: claims submission, electronic billing, duplicate billing, credit balances, MSP, coding systems, documentation, upcoding, DRG Creep, unbundling, NCCI edits, as well as an overview of fee schedules and inpatient and outpatient reimbursement systems. Each lesson takes approximately 15 minutes to complete and a Certificate of Completion is available upon the successful completion of each lesson.

HFMA Compliance: Coding

HFMA Compliance: Coding: An Overview - This lesson provides a general overview of coding requirements.

HFMA Compliance: Claims Submission - This lesson discusses the submission of electronic and paper Medicare claims.

HFMA Compliance: HCPCS/CPT Codes, parts 1-3 – These lessons discuss the use of HCPCS/CPT Level I & 2 codes in billing and explains methods through which to inquire about and request changes to HCPCS Level II codes.

HFMA Compliance: The ICD-9-CM - This lesson generally discusses the ICD-9-CM coding system.

HFMA Compliance: The National Correct Coding Initiative - This lesson explains the procedures CMS has implemented to ensure that bills are coded properly.

HFMA Compliance: Coding Risks: Upcoding and DRG Creep - This lesson discusses the coding risks commonly referred to as

HFMA Compliance: Coding Risk: Unbundling - This lesson discusses the coding risk of unbundling comprehensive codes.

HFMA Compliance: Billing

HFMA Compliance: Electronic Billing - This lesson discusses the requirements relating to the electronic submission of claims and other information to Medicare.

HFMA Compliance: Medicare as Secondary Payer, parts 1-2 - These lessons discuss the Medicare the general and specific provisions of the Medicare.as a secondary payer (MSP) rules.

HFMA Compliance: National Coverage Determinations and Local Coverage Determinations -
This lesson discusses Medicare coverage determinations.

HFMA Compliance: Credit Balances - This lesson discusses the requirement to report and repay credit balances to Medicare.

HFMA Compliance: Documentation Requirements - This lesson discusses documentation requirements and recommendations.

HFMA Compliance: Billing Risk Areas: Services - This lesson discusses compliance risk areas identified by the Office of the Inspector General.

HFMA Compliance: Billing Risk Areas: Duplicate Billing - This lesson discusses compliance risk areas identified by the Office of the Inspector General.

HFMA Compliance: Reimbursement

HFMA Compliance: The Prospective Payment System: An Overview - This lesson provides an overview of the various prospective payment systems used in the Medicare program.

HFMA Compliance: Fee Schedule Payment Systems: An Overview - This lesson provides an overview of various types of Medicare fee schedules.

HFMA Compliance: The Inpatient Prospective Payment System, part 1 - This lesson provides a general discussion and overview of Medicare reimbursement under the Inpatient Prospective Payment System (IPPS).

HFMA Compliance: The Inpatient Prospective Payment System, part 2 - This lesson discusses specific instances in which a hospital may receive additional payments under the Inpatient Prospective Payment System (IPPS).

HFMA Compliance: The Outpatient Prospective Payment System: An Overview - This lesson provides a general discussion and overview of reimbursement provided by Medicare under the outpatient prospective payment system (OPPS).

HFMA Compliance: The Outpatient Prospective Payment System: Using APCs - This lesson discusses the use of ambulatory payment classifications (APCs) in the outpatient prospective payment system

Appendix for AP-588

Literature:

Arthur, Diane. Managing Human Resources in Small & Mid-Sized Companies, 2nd ed. American Management Association, 1995.

Fottler, Myron, et al. Essentials of Human Resources Mangement in Health Services Organizations. Delmar Publishers, 1998.

Barbeito, Carol. Human Resources Policies and Procedures for Nonprofit Organizations.

Learning Activity:

Proposing to use as a learning activity:

Name of Program:
Essentials of Human Resource Management Certificate Program

Purpose of event/program:
To teach basics of human resources management

Length of event/program:
Approximately 18 hours

Brief overview of event/program:
See below

Contact information for event/program:
Society for Human Resource Management, 800-2XX-7416, shrm@shrm.org

Introduction

SHRM's Essentials of Human Resource Management Certificate Program (formerly Fundamentals of HR Management Certificate Program) is a solid, introductory-level course in human resource management that increases participants" HR knowledge, enhances their ability to deal with crucial issues, and deepens their understanding of HR.

Overview

This program is a must for anyone managing people; knowledge of the essentials can keep you and your company out of trouble. Knowing the basic HR concepts before disciplinary action is required and HR has to get involved can make you a better manager. This program can help anyone develop a competence in HR and promote a consistent understanding of the HR function to non-HR management.

Affiliations

IN PARTNERSHIP WITH

SHRM™

SOCIETY FOR HUMAN RESOURCE MANAGEMENT

Sanctioned by the Society for Human Resource Management (SHRM). Materials are developed by SHRM®.

Who Should Attend

The program is specifically designed for employees with management responsibilities:

- Entry-level human resource professionals
- Divisional or departmental supervisors who are responsible for interviewing and training employees
- Career changers
- Team leaders with supervisory accountabilities
- Employees with management responsibilities
- Individuals seeking higher management positions
- HR professionals whose experience has been in a single functional area such as staffing, benefits, recruitment, payroll, etc.

Frequently Asked Questions

Should I take the SHRM Learning System ™ or the SHRM® Essentials of Human Resource Management Certificate Program?

The Professional in Human Resources (PHR®) and the Senior Professional in Human Resources (SPHR™) exam are both based on U.S. laws, regulations, and practices and are generalist in nature (i.e., they assess all the functional areas of the HR field). Typically, individuals who are planning invest in the HR career and are interested in certification are better candidates for the SHRM Learning System™. The Essentials program is designed for junior HR practitioners but is also ideal for individuals involved in hiring or managing employees.

Do I need an HR background?

An HR background is not necessary to gain a broad overview of the human resource function with the SHRM® Essentials of Human Resource Management Certificate Program. Since the program is not based on a certification, previous HR experience is not required.

Is there a certification exam?

No, currently there is not a certification tied to the SHRM® Essentials of Human Resource Management Certificate Program. However, the basic HR knowledge covered in this program mirrors the HRCI body of knowledge in general format.

Is there any out-of-class work required?

A participant activities book is included with the purchased materials. Depending on how your class is structured, the instructor may assign these activities for our-of-class completion.

Will I be able to get a job in HR after this class?

Essentials of Human Resource Management is designed as an introductory program that offers a broad overview of the HR function. Participants will gain practical HR knowledge that may be helpful during the hiring process. It is not, however, a guarantee for securing employment in the HR field.

I"m thinking about going into HR. Will this class be helpful for me?

Yes, this program provides a broad overview of the HR function and can provide a foundation of HR knowledge to build upon.

Syllabus

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Module 1 Essentials of Human Resource Management:

This module answers the question "What is human resource management?"

Module 2 Employment Law in Your Workplace:
This module explains the key pieces of legislation with which an organization must comply.

Module 3 Effective Recruitment and Selection Techniques:
This module examines several important aspects of staffing and focuses on how to make the best match between the job and the person.

Module 4 Basics of Compensation:
This module discusses key aspects of a total compensation system, maps out the process for developing pay structures, and describes the common types of pay increases.

Module 5 Orienting and Training Your Employees:
This module discusses the purpose of employee orientation, training and development.

Module 6 Ensuring Quality Performance:
The module discusses the purpose of performance appraisals and maps out the appraisal process.