



LEWIS-MASON-THURSTON
AREA AGENCY ON AGING



ELEVATING MANAGERS

Two Proven Models for Building
Competence and Confidence

USAging Conference
San Diego, CA
July 28, 2026



Introductions



Kyle Sanchez, MPA
Planning Director

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Bay Aging
Urbanna, VA



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LEWIS-MASON-THURSTON
AREA AGENCY ON AGING



About Us



- ~350 Employees:
 - 39 Leadership Team Members (3 executives, 13 senior leaders)
 - +/- 310 Non-leadership Staff
- 3 Main Divisions: Health, Housing, & Transportation
- AAA Services - PSA 17/18 in Virginia (10 Counties)
- VAAACares®, Virginia's Community Care Hub
- VDC – 7 States, DC, and 2 Territories
- 36,463 people served in FY25

- ~ 76 Direct Service Staff
- 17 Management Team
 - ED & Deputy ED
 - 4 Officers
 - 6 Directors
 - 3 Managers
 - 1 Government Affairs Program Liaison
 - 1 Executive Assistance
- 26 Leadership Team
 - Management Team
 - 9 Supervisors
- ~15,000 people served in FY25

Why Leadership 2.0?

"I entered a management role after taking leadership 1.0 and incorporated lessons learned into my new role. Taking Leadership 2.0 helped me identify what leadership practices I wanted to zero in on as a Director."



Valerie Aubertin
Community Supports
Director



LAUNCHED
2025



DRIVE INNOVATION
ACROSS THE ORG



REFINE HIGH-IMPACT
LEADERSHIP PRACTICES



STRENGTHEN
STRATEGIC THINKING



ACCELERATE RESULTS
AND RESILIENCE



LEAD THROUGH
COMPLEXITY

Why A Leadership Institute 2.0 Management Training Collaborative?

- HRD & CEO Identified Training Needs for Management Staff
- Staff requests for next level professional development
- Management focus group input
- Need to ensure management staff trained on company employment policies, protocols, and processes for successful compliance and leadership



GOALS

- **Establish Foundational Training:** Sharpen the skills of our leadership staff; Providing customized, skill-building training for new and experienced leaders.
- **Ensure Policy Awareness:** Clarify key responsibilities and standard workplace compliance guidelines.
- **Equip with Leadership Tools:** Deliver practical resources to support ongoing team success.
- **Act as Agency Ambassadors:** Champion Bay Aging's workplace standards and act as a direct link to internal support.



Training Format - LMTAAA

Learning Modalities

9 Group Coaching Sessions

Self-Reflection Role Play

Individual Action and Growth Plans

Co-Mentor Masterminds

Supplemental Reading

Worksheets

Small and Large Group Discussion

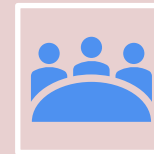


“This experience reinforced that leadership is a continuous practice—one where learning about myself is inseparable from learning how to lead others well”

Training Format - LMTAAA

Example Schedule

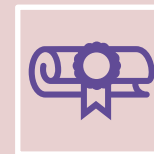
8:30-9:00	<i>Self-study on topic</i>
9:00-11:00	<i>Group coaching session #1</i>
11:00-11:15	<i>Break</i>
11:15-12:00	<i>Co-mentor mastermind</i>
12:00-1:00	<i>Lunch</i>
1:00-3:00	<i>Group coaching session #2</i>
3:00-3:15	<i>Break</i>
3:15-4:30	<i>Participant mini-teaches</i>



4 in person & 5 virtual all-day trainings



Co-Mentor Masterminds



~30-60 minutes out-of-class
work per session



Participant-led mini teaches

LMTAAA Leadership Academy

Mini-Teach Topics

How to Improve Employee Morale

Build trust

Show respect

Get to know employees

Team building

Get feedback

Address negative employees

Promote creativity

Provide growth opportunities

Give employees autonomy

Make work fun

- Organized Onboarding
- Leading for a Morale Boost
- Concepts of Learning to Lead and Leading to Learn
- Thanks for the Feedback
- And more!

Training Format – Bay Aging

- Selection Process by Invitation: Supervisors, Managers, Assistant Directors, Directors
- 1 hour per session, 6 sessions, 1 per month, in-person
- Customized curriculum developed by HRD based on identified needs and Bay Aging policies, processes, and protocols
- Includes 6 online video course assignments
- Supplemented with guest speakers and interactive case studies/role play.
- Graduation ceremony, certificate, and gifts



Participants practice coaching staff in small-group role play activities.

Training Format – Bay Aging

In-Class Topics:

- Recruitment
- Selection & Onboarding,
- Performance Management
- Compliance
- Problem-Solving-Department-Specific Investigations & HR Related Investigations
- Leader Communication & Teambuilding
- Recognition & Relationships

Online Video Topics:

- How to Hire, Fair Labor Standards Act
- Lawful Termination
- FMLA for Leaders
- Preventing Discrimination & Harassment: A Leader's Role
- Encouraging a Substance-Free Workplace
- Stress Management
- Leading a Diverse Team
- Inclusive Leadership

Guest Speakers – Bay Aging



Program Outcomes

Leadership Academy: Level 2 Topics

- ✓ Intentional Leadership
- ✓ Being a Values-Based Team



*"I really enjoyed Leadership 2.0 as a Supervisor dedicated to continued growth and development. **One key takeaway from my experience was learning about building a values-based team.** I was able to bring this back to the team I supervise, and we have been working together to solidify our values as a team.*

*I also learned a lot about my personal leadership style and identified areas of growth I have been focusing on since completing Leadership 2.0. **I feel more confident now in my role as a Supervisor and the relationships I have developed with my team and colleagues.**"*



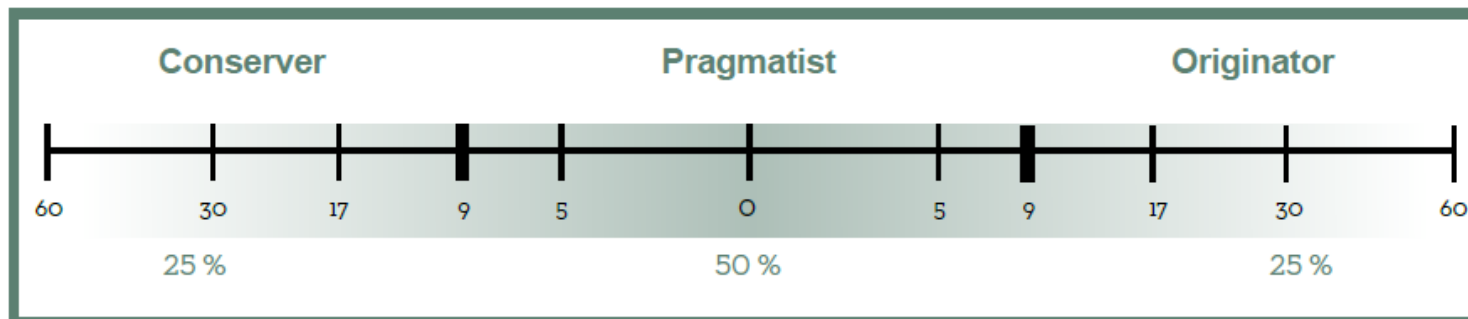
Emily Palguta
Case Management
Supervisor

Program Outcomes

"I also learned a lot about my personal leadership style..."



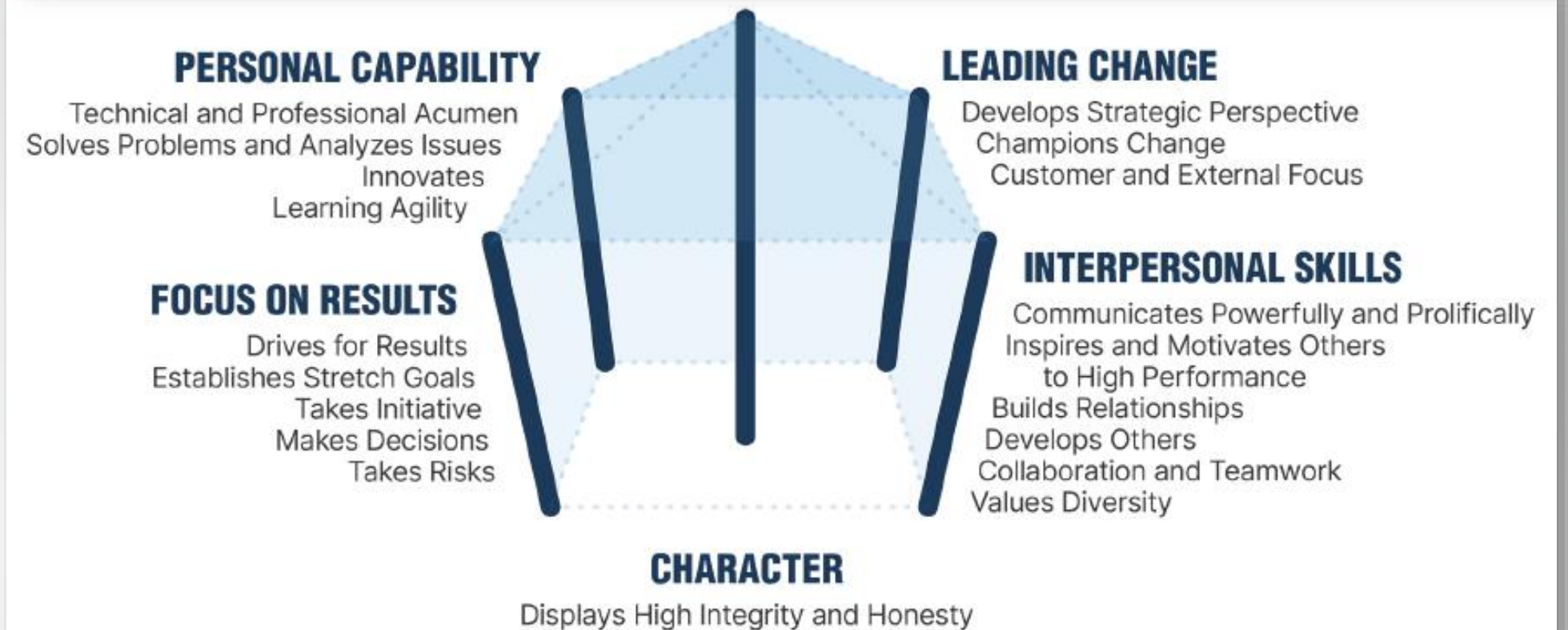
CHANGE PREFERENCES



ZENER | FOLKMAN

Feedback Report

The Extraordinary Leader Model



Program Outcomes

2 Cohorts
31 Graduates
2 Promotions
3 Expanded Roles
96.77% Retention



How Does it Improve Culture

Trained Management staff provides consistency throughout the organization.

Improved knowledge of key employment policies, processes, and protocols that they will use leading/managing their team.

Increased understanding of the manager/leader role as the GoTo person for their team and the responsibilities that come with this.

Demonstrates the importance of informed and knowledgeable leadership at all levels.

Increased connection with management colleagues and engagement in “Owning” their role.

Impact on LMT's Culture



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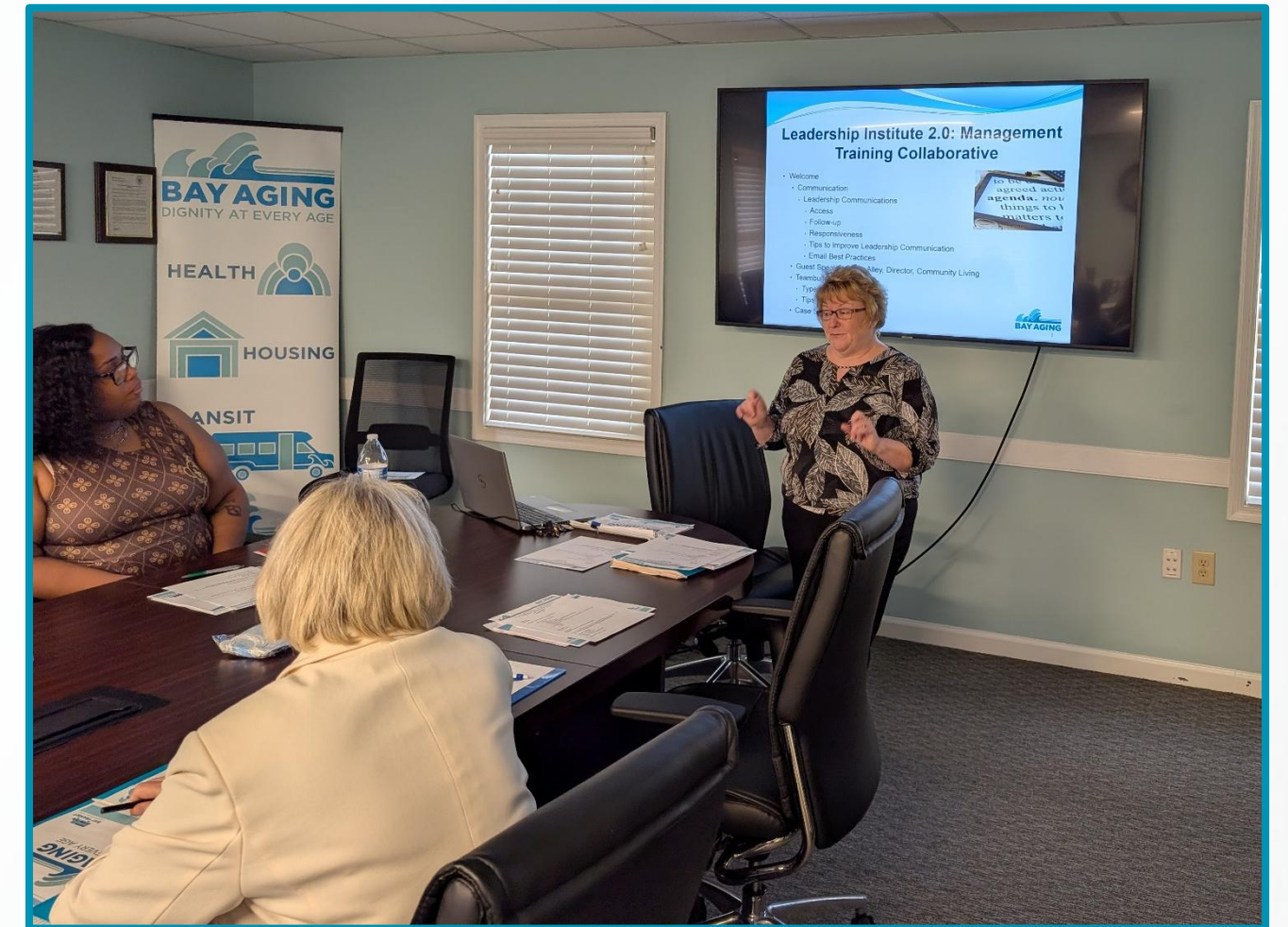
Lisa Bachmann
Government Affairs
Program Liaison

*“Leadership Academy 1.0 pushed me to grow in my confidence and leadership capabilities, but I wanted to become more effective and purposeful. When I moved into a new role at our agency, Leadership 2.0 was so helpful for ***fine-tuning some key skills***.*

*Each session provided the opportunity to go deeper into leadership practices and included ***practical take-aways that could be easily applied***. These small adjustments have had a big impact on my effectiveness.”*

Ways to Duplicate Program

- Identify key leadership gaps and/or topics- areas where you have identified issues and needs for the leadership team/organization.
- Depending on your subject-gaps/topics, identify internal resources/subject matter experts
- Look around your agency and community for FREE guest speakers and other program enhancements
- Set participation expectations



Example Leadership Topics



Leadership Academy: Level 2 Topics

- ✓ Intentional Leadership
- ✓ Being a Values-Based Team
- ✓ Future-Focus, Visioning
- ✓ Developing Your Leadership Presence
- ✓ Creating a "Lift as You Climb" Culture
- ✓ Red Teaming: Inviting a "Challenge the Process" Focused Team
- ✓ Organizational Health
- ✓ Extreme Ownership: The Leadership of Navy Seals
- ✓ Change Styles of Effective Teams
- ✓ Neurolinguistic Programming & Intentional Communication
- ✓ Positive Intelligence 1 & 2
- ✓ Building Resilience & Stress Management
- ✓ The Power of Vulnerability, Trust Building, Productive Perseverance
- ✓ Authentic Connection & Change-Ready Teams
- ✓ The Power Couple: Gratitude & Generosity
- ✓ Possibility Thinking & Innovation Mindset
- ✓ + 360 Zenger Folkman Extraordinary Leader Assessment with Action Planning Coaching
- ✓ + Leadership Book
- ✓ Force of Nature & Graduation

Programs at-a-Glance



Bay Aging's Leadership Institute 2.0 Management Training Collaborative

- Management staff are invited to participate based on position; new or refresher training
- 14-17 participants per cohort
- 1-hour sessions, 6 sessions, 6 months
 - In-person
- Participants can miss up to 2 classes
- Facilitated in-house
- Customized curriculum
- Online video courses, guest speakers, forms/tools, case studies/role play
- Graduation ceremony, certificate, & gifts



LMTAAA's Leadership Academy

- Management team members invited to participate
- 9 all-day sessions (4 in person, 5 virtual)
- 30-60 minutes out of class participation
- Facilitated by a consultant
 - Lancaster Leadership
- Components: 9 Group Coaching Sessions, Self-Reflection, Role Play, Individual Action and Growth Plans, Co-Mentor Masterminds, Supplemental Reading, Worksheets, Small and Large Group Discussion
- Graduation ceremony & certificate

Questions?

If you want 1 year of prosperity, grow grain.
If you want 10 years of prosperity, grow trees.
If you want 100 years of prosperity, grow people.
-Chinese Proverb



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