LeadingAge PA (then PANPHA) worked with a task force including association members, LTC healthcare leaders and members of the Pennsylvania state legislature to write and publish the original NorthStar publication. Using the NorthStar to symbolize a guiding light, the task force identified eight areas on which it believed LeadingAge PA's members should focus in order to best serve its members.

Those eight points, the NorthStar Points, provided the framework for LeadingAge PA's decisions and actions for more than seven years. Many of the association's members used the NorthStar framework to guide their decisions and to influence their strategic planning outcomes.

Due to the rapid pace of change our profession is experiencing, LeadingAge PA's Board determined that the NorthStar publication should be revisited and revised to reflect the new challenges, shifts and trends with which our members are contending. A task force, formed in July 2012, was charged with updating the original document. The six-month process that followed was rigorous and comprehensive and included significant involvement from the entire Board.

The most significant outcome of the process was a stated envisioned future for Pennsylvania senior services. This statement served as the focal point and led to the development of the eight revised NorthStar points.

What follows is the revised NorthStar, which, like the original, can serve as a guide to our members and their Boards as they position their organizations for long-term sustainability and success.

**Envisioned Future of Senior Services for Pennsylvania**

Adults are living longer, healthier lives with greater purpose and meaning in their “home” environment, however they define home. Consumers and their families are able to smoothly self-navigate through a comprehensive and coordinated set of exceptional services. Financial sources and government regulations allow people of various financial means to access a choice of services facilitating their desired quality of life. They are able to access these services when they need them and, whenever possible, where they would like to receive them.
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**Vision Statement**

LeadingAge PA's vision is to serve as the preeminent advocate for facilitating change and inspiring its members to positively impact the field of aging services in Pennsylvania.

**Why is NorthStar 2.0 Important?**

- Because it articulates a consumer-focused envisioned future of senior services for Pennsylvania
- Because LeadingAge PA's not-for-profit members are committed to providing the best services possible to their residents
- Because it articulates a leadership position that will guide LeadingAge PA's advocacy
- Because it will make a difference in what, how and where seniors will receive services
- Because it provides a long-term focus for LeadingAge PA and its members
What is NorthStar 2.0?

- It is a guide and framework to help our members execute LeadingAge PA’s envisioned future of senior services for Pennsylvania
- It is a document that helps our members focus on the four critical areas of leadership that are absolutely essential to be successful in the 21st Century
- It is a publication that can be shared with Boards to provide focus for strategic planning conversations
- It is a management tool for our members
- It is a tool that can be used to help assess an organization’s leadership and consumer focus
Envisioned Future of Senior Services for Pennsylvania

Adults are living longer, healthier lives with greater purpose and meaning in their “home” environment, however they define home. Consumers and their families are able to smoothly self-navigate through a comprehensive and coordinated set of exceptional services. Financial sources and government regulations allow people of various financial means to access a choice of services facilitating their desired quality of life. They are able to access these services when they need them and, whenever possible, where they would like to receive them.

Member Support of the Envisioned Future:

LeadingAge PA members are routinely providing innovative solutions and have strategically positioned themselves within the array of services. Members leverage their service expertise, unique strengths and community partnerships, resulting in long-term sustainability.

LeadingAge PA Support of the Envisioned Future:

LeadingAge PA is a strategic association of mission-driven, not-for-profit providers. The association, in partnership with its members, is leading the way to the envisioned future of senior services with the NorthStar 2.0 as its guide.
NorthStar 2.0 Elements

**Envisioned Future of Senior Services for Pennsylvania**

**ELEMENT 1:**

**NorthStar 2.0’s Eight Points**

NorthStar 2.0 has eight points that provide directional guidance. Four of the points focus on areas that require leadership. Four of the points provide directional guidance for consumer-focused areas that revolve around consumer choice, needs and expectations. Jointly, these eight points provide the framework for achieving LeadingAge PA’s envisioned future of senior services for Pennsylvania.

**ELEMENT 2:**

**“Point” Descriptors**

A set of descriptors was developed to help define and provide context for each of the eight points. The descriptors will help an organization’s Board, managers and employees gain a better understanding of each point and how it supports the envisioned future.

**ELEMENT 3:**

**Navigation Markers**

A set of navigation markers was developed for each of the eight NorthStar 2.0 points. The purpose of the markers is to provide a set of characteristics depicting what an organization would do, how it would operate, what it would offer, how its managers and leaders would think, etc., in order to successfully support a specific NorthStar 2.0 point.

Members can use the navigation markers to inform their strategic planning process as well as their operational goal setting. The markers are intended to aid leaders and managers in transforming their organization.

The navigation markers on pages 10-19 are presented in the following way:

- Characteristics of a fully mature, consumer-focused organization where “Services are Easy to Access and Navigate” include...

- Characteristics of a fully mature, “Strategically Positioned” organization include...
ELEMENT 1:
NORTHSTAR 2.0’S EIGHT POINTS

- Members are Strategic Leaders & Advocates
- Seniors are Living with Purpose & Meaning
- Organizations are Transformative
- Choices are Consumer Centered
- Services are Easy to Access & Navigate
- Members are Strategically Positioned
- Services are “Home” Centered
- Members are Financially Viable
ELEMENT 2: LEADERSHIP-FOCUSED “POINT” DESCRIPTORS

Members are Strategic Leaders & Advocates

“Point” Descriptors:
- Members continually advocate for meaningful, long-term change
- Members keep the consumer at the forefront
- All advocacy is aligned with the Envisioned Future

Members are Strategically Positioned

“Point” Descriptors:
- Members develop key partnerships throughout the continuum of services
- Members align their core competencies with the needs of the community they serve
- Members focus on what they do well that provides value to the consumer and the community they serve

Organizations are Transformative

“Point” Descriptors:
- Leaders adopt high-performing systems and methods
- Organization is person centered with a strong sense of social accountability
- Organization is agile in meeting ever-changing needs of the consumer and the marketplace
- All organizational departments and areas (i.e., workforce, technology, quality, etc.) are part of the transformation strategy
- Activities that are not a core competency and do not provide value are discontinued

Members are Financially Viable

“Point” Descriptors:
- Members remain financially viable by managing all eight NorthStar 2.0 points
- Members continually manage their internal cost system
- Members continually look for and leverage improved and new revenue streams
Seniors are Living with Purpose & Meaning

“Point” Descriptors:
- Member organizations intentionally create environments designed to allow consumers to discover or rediscover their true talents and creative passions
- Member organizations help consumers use their talents and passions in a way that:
  - Creates meaningful, positive change in themselves and their lives
  - Contributes to the member organization’s culture and vibrancy
  - Can positively impact the community where they live

Services are “Home” Centered

“Point” Descriptors:
- Members embrace how each consumer chooses to define “home”
- Members seek to deliver services in traditional and non-traditional settings, i.e., within their borders as well as outside their borders
- Wherever services and care are provided, they are delivered in a “home environment” as defined by the consumer

Choices are Consumer Centered

“Point” Descriptors:
- Members respect the consumer’s right to choose the course of their life
- Members create an environment of shared responsibility that honors and empowers the consumer to make their own informed choice
- Members educate their own staff as well as families and the consumer to ensure understanding of the choices
Services are Easy to Access & Navigate

“Point” Descriptors:

• Members design programs and services from a consumer perspective to ensure that they are accessible, seamless and easy to navigate.

• Members coordinate their services with other healthcare providers and community-based organizations to ensure a seamless delivery of services and care.

• Members measure consumer satisfaction with ease of access and navigation, and act to improve programs and services that do not meet consumer expectations.
ELEMENT 3:
LEADERSHIP-FOCUSED NAVIGATION MARKERS

The Leadership-Focused points represent the strategic aspects of NorthStar 2.0 and must be achieved in order for organizations to successfully execute the four Consumer-Focused NorthStar 2.0 points. The eight points are inter-dependent and require that the organization’s leadership and management teams view the points holistically.
“Point” – Members are Strategic Leaders & Advocates

“Point” Descriptors:
- Members continually advocate for meaningful, long-term change
- Members keep the consumer at the forefront
- All advocacy is aligned with the Envisioned Future

NAVIGATION MARKERS of a fully mature organization that is a Strategic Leader and Advocate:

STRATEGIC AWARENESS & DIRECTION
- Members have a strong and clearly defined envisioned future of senior services in Pennsylvania and are using it to inform strategy and decision making.
- Leaders have established and communicated a clear strategic direction for their organization that furthers its mission and supports LeadingAge PA’s envisioned future. Strategic goals and action plans are in place and are used to inform decision making. Performance to goals and action plans is measured, and gaps in performance are addressed.

ADVOCACY
- Member organizations are advocates within their marketplaces, helping to shape the direction of the community in support of the organization and its consumers. Members influence the legislative direction of the lawmakers in their marketplaces to further the envisioned future of senior services.
“Point” – Members are Strategically Positioned

“Point” Descriptors:
- Members develop key partnerships throughout the continuum of services
- Members align their core competencies with the needs of the community they serve
- Members focus on what they do well that provides value to the consumer and the community they serve

NAVIGATION MARKERS of a fully mature, Strategically Positioned organization:

VALUE PROPOSITION
- Leaders understand the organization’s Value Proposition as defined by the market they serve. They continually look for ways to provide value to the consumers in the market their organization serves.

MARKET SAVVY
- Leaders understand the geographic market they serve, including prospective consumers’ needs and expectations.
- Leaders are active in their marketplace and understand which services are provided and how their organization fits into the continuum of services for consumers.
- Gaps in services are addressed, and redundant or undesired services are eliminated or changed.
- Shifts in consumer expectations, the regulatory environment, technology, quality and society in general are continually evaluated to maintain the desired strategic position within the market territory.

STRATEGIC PARTNERSHIPS ARE DEVELOPED AND LEVERAGED
- Leaders have identified and partnered with organizations that create a strategic synergy resulting in:
  ... Furthering the organization’s mission
  ... Increased ability to serve the consumer
  ... Development of innovative solutions to meet consumer needs & expectations
  ... Operational efficiencies and enhanced financial performance
ELEMENT 3: LEADERSHIP-FOCUSED NAVIGATION MARKERS

“Point” – Organizations are Transformative

“Point” Descriptors:

- Leaders adopt high-performing systems and methods
- Organization is person centered with a strong sense of social accountability
- Organization is agile in meeting ever-changing needs of the consumer and the marketplace
- All areas of the organization are transformed, i.e., workforce, technology, quality, etc.
- Activities that are not a core competency and do not provide value are discontinued

NAVIGATION MARKERS of a fully mature, Transformative Organization:

HIGH-PERFORMING BOARDS

- Board Trustees understand their responsibilities, follow governance best practices, provide strategic vision and fulfill their responsibility to facilitate, through their leadership and decisions, the organization’s ability to be transformative.

FOCUS ON CULTURE

- Leaders understand the criticality of culture in developing a high-performing organization that is person centered.

PERFORMANCE MANAGEMENT

- Leaders have put into place a culture of continuous improvement. Performance is systematically measured, goals are established and gaps in performance are addressed.

INNOVATION AND IMPROVEMENT

- Leaders have created a culture among the workforce and leadership that drives improvement and innovation throughout all aspects of the organization. Services are constantly evaluated for ways to exceed consumer expectations.

WORKFORCE DEVELOPMENT AND ENGAGEMENT

- The organization has created a competency and culture of talent management and development that engages and empowers team members, resulting in high performance, innovation and increased satisfaction.

USE OF TECHNOLOGY

- Technology is leveraged to drive cost-efficient and superior delivery of services. The organization is attuned to its consumers’ technology expectations.

OPERATIONAL EXCELLENCE

- Transformative organizations provide high value through lower cost, productive and efficient operations, allowing for more affordable service and care. This results in benchmark-level performance in the areas of delivery of services, consumer satisfaction and financial performance.
“Point” – Members are Financially Viable

“Point” Descriptors:
• Members remain financially viable by managing all eight NorthStar 2.0 points
• Members continually manage their internal cost system
• Members continually look for and leverage improved and new revenue streams

NAVIGATION MARKERS of a fully mature, Financially Viable organization:

STRATEGIC MINDSET
• Financial decisions support the strategic direction and mission of the organization. Organizational resources needed to achieve the strategic direction and mission of the organization have been identified and planned for.

ECONOMIC ENGINE
• Revenue sources beyond government reimbursements have been identified and leveraged. Investments are reviewed and managed. Strategic alliances yield financial benefits. Innovative approaches to fund development are in place.

COMPLETE UNDERSTANDING OF COSTS AND COST DRIVERS
• All costs and associated cost drivers are identified, understood and managed.

COST STRUCTURE IS ALIGNED WITH ITS VALUE PROPOSITION
• The organization has aligned its cost structure with its value proposition to ensure that value to the consumer is maximized and non-aligned costs are minimized or eliminated.

LEADERSHIP TEAM MAKES FINANCIALLY INFORMED DECISIONS
• A business acumen competency is developed throughout the organization and is supported by an accurate, aligned and timely reporting system.

LEADERSHIP TEAM MAKES THE DIFFICULT DECISIONS
• Leaders make the difficult decisions necessary to ensure that the organization is aligned with its value proposition. The decisions are executed with agility.
The Consumer-Focused points reinforce LeadingAge PA’s members’ commitment to providing the best possible environment and services for its residents and consumers. The points reflect the current and projected trends in senior services, and these points are central to LeadingAge PA’s envisioned future of senior services. The execution of these four points also helps to support the Leadership-Focused points. NorthStar 2.0’s eight points are inter-dependent and require the organization’s leadership and management teams to view the points holistically.
**“Point” - Seniors are Living with Purpose & Meaning**

**“Point” Descriptors:**

- Member organizations intentionally create environments designed to allow consumers to discover or rediscover their true talents and creative passions
- Member organizations help consumers use their talents and passions in a way that:
  - Creates meaningful, positive change in themselves and their lives
  - Contributes to the member organization’s culture and vibrancy
  - Can positively impact the community where they live

**NAVIGATION MARKERS of a fully mature, consumer-focused organization where Seniors are Living with Purpose & Meaning:**

**ACUTE AWARENESS OF CONSUMER NEEDS AND EXPECTATIONS**

- The organization has a systematic approach to knowing its consumers in a meaningful way that allows it to gather actionable information from both existing and potential consumers to ensure that its services are meeting consumer needs and expectations.
- The organization actively monitors the marketplace for shifts/trends that will shape consumer needs in the future and is using the findings to inform strategy and direction.

**CONSUMER RELATIONSHIP**

- The organization has an intentional focus on building relationships with its consumers to ensure that needs and expectations are not only understood but are being lived out.
- The organization involves the consumer in key choices that shape the purpose and meaning of their lives.
- The organization uses all aspects of environments (physical, organizational, psycho/social/spiritual) to empower consumers to live fully.
- The organization’s consumer satisfaction measures are aligned with ensuring that consumers experience meaning and purpose in their lives.

**SOCIAL ACCOUNTABILITY**

- The organization’s strong sense of social accountability is reflected in the services it provides to, and through, consumers. Organizations create an environment that fosters opportunities for consumers and team members to contribute to the good of the larger community, resulting in a sense of meaning and purpose.
- Programs and services are aligned with the mission of the organization.
- Programs and services address the development and well-being of the whole individual; physically, intellectually, emotionally, vocationally, socially and spiritually.
“Point” – Services are “Home” Centered

“Point” Descriptors:

• Members embrace how each consumer chooses to define “home”
• Members seek to deliver services in traditional and non-traditional settings, i.e., within their borders as well as outside their borders
• Wherever services and care are provided, they are delivered in a “home environment” as defined by the consumer

NAVIGATION MARKERS of a fully mature, consumer-focused organization where Services are “Home” Centered:

“HOME” CENTERED AS DEFINED BY THE CONSUMER
• Senior leaders understand where and how their consumers want to receive services and have designed services to be delivered in ways that meet the consumers’ definition of a home environment, regardless of where the service is delivered.

BEYOND THE BORDERS
• The organization leverages its expertise in innovative ways to deliver services beyond its walls. This includes the traditional consumer-defined home.
• The organization leverages opportunities with other providers to deliver service and care in non-traditional locations.

WITHIN THE BORDERS
• Within their own organization, senior leaders ensure that services are delivered in a person-centered manner which creates a home environment that is desirable by the consumer.

WHEREVER CARE IS DELIVERED
• No matter where the consumer is in the service continuum, a focus on creating a consumer-centered home environment is evident.
“Point” – Choices are Consumer Centered

“Point” Descriptors:

- Members respect the consumer’s right to choose the course of their life
- Members create an environment of shared responsibility that honors and empowers the consumer to make their own informed choice
- Members educate their own staff as well as families and the consumer to ensure understanding of the choices

NAVIGATION MARKERS of a fully mature, consumer-focused organization where Choices are Consumer Centered:

CONSUMER HONORING

- Mature organizations develop and offer choices in a consumer-honoring manner that is openly collaborative and non-paternalistic.
- Focuses on understanding and serving the “whole person”
- Provides programs, services and care that can be tailored to each person’s specific situation, needs and preferences

SHARED RESPONSIBILITY

- Member organizations understand that there is a shared responsibility with consumer-centered choices. They have developed approaches that inform the consumer of not only what the options are but what the options portend.
- There is a negotiated risk process in place that supports shared responsibility.

CONSUMER AND STAFF EDUCATION

- Organizations ensure that consumers are educated regarding their choices and that it is done in a way that is understandable to them.
- Education is done in a way that promotes awareness of self, situation and options, resulting in the consumers’ ability to communicate effectively with provider community and make empowered decisions.
- Staff that interface with consumers regarding choices are educated on:
  - What choices are offered
  - Implications/risks/rewards
  - Being consumer centered and consumer honoring
“Point” – Services are Easy to Access & Navigate

“Point” Descriptors:

• Members design programs and services from a consumer perspective to ensure that they are accessible, seamless and easy to navigate
• Members coordinate their services with other healthcare providers and community-based organizations to ensure a seamless delivery of services and care
• Members measure consumer satisfaction with ease of access and navigation, and act to improve programs and services that do not meet consumer expectations

NAVIGATION MARKERS of a fully mature, consumer-focused organization where Services are Easy to Access and Navigate:

SERVICE DESIGN AND DELIVERY
• Services are designed from the consumer point of view with emphasis on ease of access. The range of consumer abilities and acumen is considered when designing and delivering services.
• The organization employs innovative approaches to designing services that are easy to access and navigate.
• Access and navigation is easy to understand.
• The organization has measurable outcomes that indicate consumer ease of access and navigation.

ACCESS IS ALIGNED WITH CONSUMER LIFESTYLE
• Leaders understand consumers’ current and potential ways of life, and match their services and care to meet the breadth of needs.

SEAMLESS ACCESS BETWEEN ORGANIZATIONS
• Leaders have partnered with other providers to ensure that consumers can move seamlessly from service to service regardless of the provider.
• Access and navigation between providers is easy to understand.
How to Use the NorthStar 2.0 in Your Organization

The NorthStar 2.0 descriptors and navigation markers provide a path to the envisioned future of senior services for Pennsylvania. Organizations are encouraged to use the descriptors and markers to inform their own path to long-term sustainability and improved overall performance. The following guidelines represent ideas on how to best incorporate the NorthStar 2.0 in your organization.

Understanding NorthStar 2.0

NorthStar 2.0 represents an envisioned future of member organizations that are financially strong, consumer centered, strategically focused and are considered leaders in their market. For some organizations, the NorthStar 2.0 may represent a significant change from their current level of operations.

The first step in using NorthStar 2.0 in your organization is for the leadership team to become familiar with the NorthStar 2.0’s eight points, the description of each and the navigation markers. Have your team scan the descriptors and markers and discuss initial impressions.

Using Navigation Markers as a Diagnostic Tool

The best method for using the NorthStar 2.0 as a guide for improving your organization’s long-term sustainability and overall performance is to use the Navigation Markers as a diagnostic tool. By assessing your organization with the markers, you create a profile of strengths and opportunities for improvement.

One way to use the markers as a diagnostic tool is to have the leadership team take each marker and do an internal assessment comparing each characteristic of the marker against the organization’s practices and identify existing gaps.

Example:  
- The senior leaders of a member organization are divided into teams and each team is assigned one of the eight points of the NorthStar 2.0.

- The team assigned Financial Viability for Providers reviewed the navigation marker Complete Understanding of Costs and Cost Drivers.
• They concluded that the organization had identified and understood their costs and were reporting them monthly. However, the team identified that the organization really didn’t understand all of the cost drivers behind each cost.

• The organization decided to educate its managers on cost drivers and began an initiative to identify the activities that cause a cost to occur.

• As a result of this initiative, the organization significantly improved its ability to manage its costs resulting in overall reduced costs and increased margin.

Incorporating NorthStar 2.0 into Your Planning Process

An optimal use of NorthStar 2.0 occurs when the diagnostic approach is aligned with the organization’s existing planning process. This can be the strategic planning process, the process for setting organizational goals or any other planning cycle that is already in place.

Using the navigation markers as a diagnostic tool, the outcomes of the “diagnosis” can be incorporated into a SWOT analysis or an internal environmental scan prior to the planning process. The gaps or opportunities for improvement identified as a result of the diagnostic process can be prioritized and incorporated into the organization’s strategic and operational goals.

HOW TO INVOLVE YOUR BOARD

Boards are critical to the success of any organization. That is why the NorthStar 2.0 descriptors and navigation markers address the role of the Board in realizing the envisioned future of senior services for Pennsylvania. The following guidelines represent ideas on how to best engage Boards in using the NorthStar 2.0 model.

Communicating NorthStar 2.0

It is critical that Boards understand and participate in the use of the NorthStar 2.0 model to guide the organization. Leaders should review NorthStar 2.0 with the Board and have an open discussion around the envisioned future and the eight points that focus on leadership and the consumer. Questions should be posed to the Board to ensure they both understand and support NorthStar 2.0. Boards may want to use this model to routinely gauge the direction of the organization.

Emphasis on those navigation markers that address Board activities may be beneficial in gaining Board understanding and support, e.g., Organizations are Transformative includes a marker regarding High-Performing Board. If desired, LeadingAge PA will meet with the member organization’s Board and provide a helpful overview of NorthStar 2.0.
HOW TO ENGAGE YOUR LEADERSHIP TEAM

More than any other group in an organization, engaging the leadership team in understanding and using NorthStar 2.0 is critical to successfully adopting the model. The following guidelines represent ideas for how to best engage the leadership team.

The Role of the Top Executive

Leaders need to understand why the organization is using NorthStar 2.0 and what the value is to the organization, to their profession and to seniors. The role of the top executive in championing the use of the model is critical.

Active Leadership Team Involvement

The organization’s leadership team is the primary group to use and incorporate the NorthStar 2.0 model into the organization’s existing planning processes. Key roles for the leadership team that will drive engagement are:

- Participate in the initial review of NorthStar 2.0’s eight points, descriptors and navigation markers
- Lead the use of the navigation markers as a diagnostic tool
- Participate in prioritizing the gaps/opportunities for improvement that are identified as a result of the assessment
- Lead initiatives/action plans to address gaps/opportunities that have been prioritized

As part of this process, the leadership team is encouraged to use the “Strategic Management Checklist” which was developed by a LeadingAge PA task force. This tool used in tandem with NorthStar 2.0 can be very effective in assisting with both strategic planning and operations.

USE NORTHSTAR 2.0 IN WAYS THAT ARE MOST HELPFUL TO YOUR ORGANIZATION

These ideas that have been outlined are provided as examples of how the NorthStar 2.0 model can be used as a tool. The goal is for your organization to determine the best way it can benefit from the model and how it can be used in practical ways to help your organization contribute to the successful execution of LeadingAge PA and its members’ envisioned future of senior services for Pennsylvania.
LeadingAge PA NorthStar 2.0 Task Force Members

Tama Carey, Chair
Immediate Past Chair, 2012 - 2013

John Dickson
Treasurer (Member at Large), 2012 - 2013

Geoff Eddowes
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Veronica Gibbone
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Stephen Lindsey
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Steve Jeffrey
Member at Large, 2012 - 2013

Robert Rundle
Central Chapter, 2012 - 2013

Jeffrey Shireman
Member at Large, 2012 - 2013
MISSION:
LeadingAge PA's mission is to promote the interests of our members by enhancing their ability to provide quality services efficiently and effectively; and by representing our members through cooperative action.