

WHITE PAPER

Transactional Dementia IntelligenceSM

A Business Model for High-Performance Dementia Caregiving



Transactional
Dementia
IntelligenceSM

Take Your Dementia Care Next Level.

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Prepared by:

Dr. Éthelle G. Lord, Founding President at the International Caregivers Association, LLC and Master Dementia Coach (January 2023). Modified by Dr. Lord (Sept. 2023) © 2023 A Publication of the International Caregivers Association (ICA). All rights reserved.

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Abstract:

In a world where the elderly population is on the rise, traditional dementia care models are faltering, leaving patients, families, and caregivers grappling with high turnover and mounting frustration. Dr. Lord presents the visionary Transactional Dementia Intelligence SM (TDI Model SM) as a solution to this pressing issue. This revolutionary approach is not an incremental step, but a comprehensive overhaul of the care system, derived from Dr. Lord's extensive two-decade experience in dementia care and coaching.

Recognizing the need for economic viability, Dr. Lord emphasizes the TDI Model as a new business model for dementia care, promising substantial cost savings and improved marketability for participating organizations. These are all byproducts of greatly decreased staff turnover and unmatched care levels.

Transactional Dementia Intelligence redefines care through innovative interprofessional interactions and exchanges—or transactions. "Dementia Intelligence" (DI), a concept pioneered by Dr. Lord, represents a new body of knowledge and a deeper understanding of dementia, acknowledging it as more than a medical condition but a unique lens through which individuals perceive reality. By shifting away from viewing dementia solely as a limiting ailment, this approach minimizes disconnection, suffering, and isolation among all dementia care stakeholders, including families.

For those living with dementia, the transition to this new reality is profound. Caregivers must develop a unique form of intelligence to connect with each patient, tailored to their specific diagnosis and dementia stage. When executed skillfully, dementia care holds the potential to transform lives, with Dr. Lord even proposing that dementia's altered state can be considered a "gift."

Mastery of DI empowers individuals to lead organizations toward superior dementia care. The Dementia Coach, certified in dementia care and coaching, plays a pivotal role in educating, training, and motivating organizations to embrace dementia intelligence.

This leadership propels dementia care into the 21st century, while Transactional Dementia Intelligence forms the foundation of TDI Partnerships, paving the way for a unified realm of care ready to revolutionize lives and reshape the dementia care landscape.

This white paper delves into the intricacies of the TDI program, shedding light on its transformative potential and offering a comprehensive exploration of its principles and applications in ushering in a new era of dementia care.

Notice: The terms Transactional Dementia IntelligenceSM, TDI Model SM, TDI Partners, Dementia Intelligence SM, and its abbreviation, DI SM, are all service marks of the International Caregivers Association (ICA) and are pending federal registration. All elements of this program are proprietary and strictly confidential.

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“The effectiveness of dementia care services is measured by individuals who put ICA’s (International Caregivers Association) standards of care contained in the Transactional Dementia IntelligenceSM into their daily practice.” ~ Dr. Ethelle Lord, DM and President at ICA

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The Problem

The key problem in long-term care, which historically existed since its inception and to this day continues to affect all of humanity, is the ratio of workers to residents. It has become an even more serious problem now with the influx of individuals diagnosed with Alzheimer's who require specialized care.

A second, and equally serious problem in long-term care, is the communication gap between the care provider and the family. The administration is concentrating on making a profit and the workers do not have time to get to know their residents well enough to meet their emotional and personal needs. This often results in aggressive behaviors too often controlled with prescription drugs and isolation of the resident. These drugs are deadly in the body of an individual living with Alzheimer's. Healthcare budgets are enormous and can no longer sustain the cost of dementia care for millions of individuals, their families, and government-subsidized care.

With the larger-than-life emergence of Alzheimer's world-wide now to over 55 million people representing 3.2 diagnoses of dementia every second of the day around the world (<https://tinyurl.com/2w5ajvx8>), the time has come to take a socially innovative healthcare program that demonstrates true cooperation for the good of the individual and society. The traditional approach (feeding, dressing, and passing out medications) is no longer acceptable.

The **Transactional Dementia IntelligenceSM** business model of dementia care enhances care for the individual, increases job satisfaction for the care provider, and increases the value of the facility in the eyes of its stakeholders. Ironically, all of this makes for a more profitable dementia care operation, since the model creates success at every level of the organization. So it is that TDI can be considered primarily a transformative business model. For an innovative approach can only become sustainable when it is economically viable.

Countries like China and India, which recently adopted long-term care institutions, will be better served for their growing cases of Alzheimer's and long-term care conditions by adopting the **Transactional Dementia Intelligence** model early and swiftly. When considering the cost of private care for the course of dementia and other conditions leading to home care, independent living communities, assisted living communities, nursing homes, and/or residential care homes, to name a few, the costs are high on many levels (personal, physical, emotional, monetary, etc.).

That usually begins with the family care provider who ends up leaving full-time work to stay home and provide daily care/supervision of care for their loved ones. This is a task very few family care providers are naturally adept at providing.

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ALZHEIMER'S AND DEMENTIA COACHING:

Taking a system's approach to creating an Alzheimer's-friendly healthcare workforce, **The Problem** is clearly outlined and the solution is offered (Pub. 2019).

In the United States of America much needs to be done to increase the quality of care and reduce the costs of care. This approach is designed to do just that, but also to beef up team formation and teamwork among a **Transactional Dementia IntelligenceSM** model with a larger team of "interprofessionals," which includes the family care providers as an integral part of long-term care. Most of all, it is the Dementia Coach or "pack leader" that is central to changing the course of long-term care.

Concept

There are four major components to this innovative concept in dementia care: first, is the individual living with dementia; second, the individualized care plan; third, the team of individuals providing care/services to the individual living with dementia (i.e., family care provider, administrator, janitor, doctor, activities director, physical therapist, dietary, nurse, aids, etc.); finally, the **dementia/health coach** at the center of the organizational chart just below the administrator and director of nursing, but *above all other positions* in the organization.

The dementia/health coach occupies a key role and is responsible for facilitating and supporting all the care providers, including the family care providers. This individual provides resources, coaching, coordination, and counsel to all other positions – including, and not limited to, the individual treatment plan for the person receiving services, whether at home or in a facility. The dementia/health coach also supports management and staff in keeping staff up-to-date with dementia care training.

The individual living with dementia is most often homebound when initially diagnosed, and prior to requiring the services of a larger team of care providers. The best way to assure safety, care, and a happy life for the individual living with memory loss or dementia is to keep up with what it means to live with dementia. The dementia/health coach would be training to coach and support families.

In the case of a large organization with several satellite cities/facilities and a variety of services to its clientele, an internal dementia/health coach would be at the corporate office. This internal dementia coach would be responsible for the company's residential coaches. This responsibility would involve the supervision of coaches, offering continuous education programs, offering occupational coaching, updating and reinventing dementia care, and hiring/firing their own coaches, etc.

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Benefits



Transactional Dementia Intelligence (TDI Model)

Benefits of adopting the Alzheimer's/Dementia-Friendly Health Care WorkforceSM program to standardize dementia care for everyone in your organization.

FACILITY/BUSINESS	MANAGEMENT	WORKFORCE	FAMILIES
Organizational Development will shift to a friendly Alzheimer's health care system	Solid team formation and teamwork	Increased job satisfaction through team support	Remaining the primary family caregiver for their loved one
Continue with existing staff and talent	Added a *doubled certified Dementia Coach position on the management team	Increase Alzheimer's care training	Integral part of a larger inter-professional team as a TDI Care Partner SM
Access to a certified Alzheimer's Coach internal or external to the organization	Closing the communication gap between staff/families	More time for one-on-one care of individuals with Alzheimer's	Completing the cycle of life and care with formal partnership agreement
Attract new long-term residents and keep them longer	Ongoing data collection and analysis	Improved family communication	Exceptional training and up-to-date techniques as a TDI Care Partner SM
Instant increased positive market exposure/preferred rating	Program is easily adopted from one location to another using existing staff	Decreased job-related job stress, burnout, and sickness	Increased positive feelings & appreciation for placement choice

**The Dementia Coach will be certified both in dementia care (individualized treatment perspective) and in dementia coaching (inculcating a new standard of dementia care performance across the board in their organization.)*

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Mission

The mission of the ICA (International Caregivers Association, LLC) is to improve the quality of care for individuals living with Alzheimer's and dementia within an institutional homestead setting, one family at a time, one recipient of care at a time, and one facility at a time. ICA assists families, organizations, and government agencies in the creation of an Alzheimer's/Dementia-Friendly Health Care Workforce in the **Transactional Dementia IntelligenceSM** business model of dementia care.

Whether in homecare, a hospital, a nursing home, an assisted living program, a long-term care facility, the ICA will diligently promote the idea that an Alzheimer's/Dementia-Friendly Healthcare Workforce elevates the facility/organization/government as the best value which will give families and health care workers the support/confidence required to succeed.

This model sustains the best possible way by including the following basic business values: accountability, responsibility, value, training, monitoring, and rewards. Intangibly the program provides a perfect avenue for families to complete their cycle of care, the life journey of the person living with dementia, and the workforce dedicated to the best delivery of dementia services at an affordable cost.

Guiding Principles

1. Alzheimer's/dementia-friendly health care is essential for all individuals living with Alzheimer's, dementia, or a long-term care condition;
2. An educated health care workforce generates the best possible care;
3. Care provider partnerships includes a limited number of family care providers ready to volunteer for training as a TDI Care Partner SM and for their services;
4. Teamwork is at the heart of an Alzheimer's-friendly interprofessional team; and
5. Respect for every person living with a long-term condition is essential.

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Vision

Our vision is changing the health care culture around the world so that individuals living with a long-term condition such as dementia always encounter and experience an Alzheimer's-friendly level of care. It is by adopting a standard of dementia care as contained in the **Transactional Dementia IntelligenceSM** model (**TDI ModelSM**) that it is possible to provide such care.



What We Do

We create teams of TDI Care PartnersSM working closely together, supporting one another, in the best possible delivery of services to individuals living with Alzheimer's and other long-term care conditions. We accomplish this by building a communication bridge between the professional healthcare workers on one side, and on the other side of the bridge, the person receiving care and their family. By building this bridge, we bridge the communication gap and increase the level of services to those receiving care. This is done by adding the "missing link or position", the dementia/health coach, and as little as 10% of capable family care providers willing to become a TDI care partner. Fewer regular staff burnout will occur, greatly increasing their skill levels and job satisfaction, thereby saving on the bottom line.

Philosophy

The **Transactional Dementia IntelligenceSM** model revolves around a simple idea; improved quality of work through teamwork, results in improved quality of life for everyone receiving care, reduces work stress and costs of care, and an increase in the ROI. One of the fundamentals of our program's success is the effective management of talents and resources of the organization/facility with enhanced quality of life and work environment. This is created by teaming existing talents with families and resources outward with certified dementia/health coach, not inward (an outward shift reflects growth, while an inward shift indicates a decreased output).

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Organizational Redesign

This new organizational structure maximizes the direct care services to individuals living with Alzheimer's and long-term conditions. We involve staff members, executives, doctors and nurses, and those families who desire to become a TDI Care PartnerSM, forming a team by learning team roles and the principles of successful teamwork. Each TDI Care PartnerSM learns important tips and proven ways to support the individual living with his/her Alzheimer's or other long-term condition. This new organizational structure results in higher levels of involvement, job satisfaction, higher levels of retention, lower stress and sick leave, cooperation among team members, increased communication, and quality of work for both professional staff members and families.

Ultimately it is the person living with Alzheimer's or a long-term condition that receives a greater level of compassionate care resulting in a higher quality of life and care; the care/social model of care in action.

Program Design

The **TDI** program is designed for a facility/organization experiencing a need to increase the number of individuals providing one-on-one care, without affecting the bottom line. Emphasis is on customer service and relationships, and the pragmatic business results that can be achieved from the "intangible" parts of the healthcare business. A TDI Care PartnerSM receives training, sometime delivered via Webinar technologies thereby allowing them to take the training in their own time (see p. 3, *Doubled Certified Dementia/Health Coach*). We realize it is not possible for nursing staff, doctors, and executives to leave their posts all at the same time for such training.

ICA makes distinctions between knowing, understanding and putting into practice. To that end a double certificate of dementia care training program offers a layered approach for dementia/health coaches so as to effectively guide TDI Care PartnersSM towards mastery in dementia care and other conditions affecting memory loss, and also in coaching. Such programs, *Doubled Certified Dementia/Health Coach*, provides introductory access to a variety of basic but essential dementia care topics, often with one single idea, technique or concept, that a TDI Care PartnerSM apply on his/her own. This may be as simple as getting the TDI Care PartnerSM to understand why their caregiving style might be at the root-cause of the resistance they experience or stress that results from their effort in providing care.

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ICA recognizes that true mastery in dementia care and other long-term conditions takes time. Reflection and mentoring of trained TDI Care PartnersSM can never be a given. Therefore, ICA offers an additional range of services such as webinars, in-person training, coaching, and mentoring. ICA knows that proven dementia care training meets the unique needs and timeframes of the person being served and all care provider's involvement is critical to changing the course of dementia care.

Empowering the TDI Care PartnerSM to acquire sufficient confidence in adapting the new standard of dementia care to meet the needs of each care receiver in the moment of service, is our goal. Such confidence is based on knowledge, training, experience, and a deep understanding of not just the "what" or the "how" of dementia care, but the "why".

Strategy Formulation

The **Transactional Dementia IntelligenceSM** allows the facility/organization to maintain its entrepreneurial nature while implementing team communication/cooperation and teamwork training to improve the quality of care being provided to individuals living with Alzheimer's or a long-term care condition. By clarifying the role of every team member thereby increasing greater appreciation, respect for one another, every TDI Care PartnerSM forms a special working bond that will last for years. Doctors will be less frustrated in communicating with the individual with dementia or a long-term condition. Family members, staff will be able to deliver even better care using this TDI Care Partner training and designation.

High Performance Caregiving

The **Transactional Dementia IntelligenceSM** model encourages and emphasizes customer service and relationships, and the "intangible" aspects and nature of teamwork within the TDI Care PartnerSM concept for managers/administrators. Managers/administrators agree to cooperate in making staff and families available to be surveyed on a quarterly basis following the pre- and post-survey policy mentioned in the Ethics/Confidentiality paragraph below.

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Dementia Coach Training

TDI Care PartnerSM requires a double certification. One in coaching and one in dementia intelligence courses. Such training programs may include self-awareness, innovation in the field of dementia care and other long-term conditions, communication styles, teamwork, speaking Alzheimer's, behavior change and ethics/confidentiality, and much more. Those programs are generally the same for every engagement; however, each program must be of custom design for cultural adaptation.

Each course utilizes pragmatic business concepts and can immediately be applied to an actual job. Every staff member, professional or non-profession, as well as participating family members receiving the Care PartnerTM training is awarded a certificate of completion and a permanent name badge with the TDI Care PartnerSM logo. The facility is then able to promote their dementia service as a TDI Care Partner facility and services. This designation is international in the world of memory care anywhere.

Ethics/Confidentiality

Ethics and confidentiality are a reality in any healthcare field and organization. The **Transactional Dementia IntelligenceSM** model emphasizes to TDI Care PartnerSM the importance of ethics and confidentiality. It further monitors feedback from class participants to assure compliance. Pre-training and post-training surveys are done to monitor compliance and the benefits of the program.

The results are submitted to the facility/organization in writing no later than 30 days after the end of the initial engagement and for the following 10 months (one year from beginning to end of the adoption of this program) data continues to be collected for the purpose of demonstrating improvements in the level of care and quality of life. Such guidelines are also part of the licensure requirements to the TDI at the ICA.

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Definitions

Alzheimer's is defined as the most common form of dementia affecting more than 5 million individuals in the United States alone, and over 46.8 million worldwide (*Source: Alzheimer's Disease International.*) Alzheimer's is both predictable and progressive in nature with symptoms worsening over time. It is a condition affecting the nerve cells in the brain responsible for memory and other mental abilities. The nerve connection is disrupted by the lower levels of chemicals that carry messages between nerve cells resulting in memory loss, poor judgment and thinking, and serious hindering of the ability to handle day-to-day activities of living.

Alzheimer's/Dementia Coach is defined as a professional coach who is at the hub of an interprofessional team of Alzheimer's care providers and must have the ability to manage/maintain the many tasks/demands of a **Transactional Dementia IntelligenceSM** business model of dementia care within a healthcare facility or a retirement community that serves individuals living with Alzheimer's, and their families. An example of a program responsibility may be to establish and manager and Alzheimer's Café where socialization is provided to families. An Alzheimer's Coach is also trained to work in home settings to prevent isolation and depression in either the family care provider or the person living with Alzheimer's.

Alzheimer's/Dementia-Friendly Health Care WorkforceTM is defined as a well-trained, certified workforce able to fully understand, appreciate, and support all the needs of the person living with Alzheimer's and their families, whether physical, mental, intellectual, and/or spiritual. The main goal is to quietly create a homestead atmosphere in a larger setting.

An Alzheimer's/Dementia-Friendly Health Care WorkforceTM is indicative of a workforce that is well trained in the care of those living with Alzheimer's and other dementias. They work within an environment that is welcoming and willing to work toward exceptional care for these residents and helps to foster a mutual respect for the role of the family member and the facility care provider. This workforce works to develop a full and complete understanding of the care these individuals need.

Transactional Dementia IntelligenceSM model is defined as a formal partnership between professional healthcare professionals and families for the greater needs of individuals living with Alzheimer's. Organizations and facilities are licensed as to adopt and advertise this program to the general public. Families have the ability to know such an organization/facility has the best possible training, knowledge, and willingness to fully engage with them in providing long-term care to their loved ones.

With this program, it is understood that the family care provider remains the primary care provider to their loved one even after admission into a hospital, nursing center, or other facility and are willing to be part of a much larger inter-professional team.

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TDI Care PartnerSM is defined as special training and certification into the **Transactional Dementia IntelligenceSM** model as part of a large inter-professional team including doctors, nurses, certified nurse assistants, management, social workers, dieticians, and families.

Certified Dementia/Health Coach is defined as a professional who may already possess a life coach certificate in addition to possessing a certified dementia care program. Examples of ICA acceptable certified dementia coach programs are: the strength-based dementia care program by Judy Cornish, *The DAWN Method*; *The Validation Method* for dementia care by Noami Fiel; *The Botes Memory Method* by Sira Botes; the *Best Friend Approach* by Virginia Bell and David Troxel; and a major in dementia and aging studies online program at the *University of Texas*. to name a few examples of ICA acceptable dementia training; in addition to a nurse coaching or life-coaching certificate.

Dementia Coach is defined as a certified life coach with specialty training in dementia/memory loss. This individual has completed extensive training from recognized dementia care programs from a recognized dementia care training program and the necessary qualities to lead an interprofessional team to deliver dementia care whether the individual is homebound or in an assisted living/nursing home.

History of Alzheimer's is defined as the discovery in a case study in 1906 presented by Dr. Alois Alzheimer's of a 51-year-old woman from Frankfurt, Auguste D, who showed several progressive signs of dementia. She was hospitalized with a cluster of symptoms: reduced comprehension and memory, aphasia, disorientation, unpredictable behavior, paranoia, auditory hallucinations and pronounced psychosocial impairment.

Interprofessional Model of Care is defined as a number of members of the same profession or field (dementia care) working collaboratively to deliver quality care and having an "interprofessional coach" at the hub of the organizational chart coordinating (team leaders/pack leaders) such collaboration for the purpose of improving dementia care delivery (shorturl.at/stCH2).

Interprofessional Coach is defined as the individuals on the dementia care team who coordinate the care of the residents/patients by a collaborative team of health care providers. It means the coach can consult with family members, dentists, pharmacists, nurses, aids, administrators, activity directors, medical doctors, janitors, or whoever may benefit from their expertise to contribute to the resident's/patient's care/treatment plan.

Long-Term Care is defined as care services lasting months and years. These services can be received in the home. They can also be received in an assisted living setting and/or nursing home setting. Long-term care is provided by care providers, medical professionals, and other professional providers, such as physical therapists, speech therapists, and activity personnel.

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Pack Leader is defined as the primary family caregiver for the individual living with dementia. This individual plays a primary member of the TDI care team. The TDI Dementia CoachSM will interview, recruit, and train a small percentage of volunteer pack leaders to add to the care team. This individual possesses important knowledge of his/her loved one and able to contribute in a meaningful way to the care plan.

Specific, but limited, tasks will be required of the pack leader. Families have a desire to care for their loved ones to the very end of life stage. After less than 5 years of homecare, the family caregiver shows symptoms of burnout. Research shows that 20% or more of family caregivers will die before the person they provide 24/7 care to dies from their condition.

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About the Creator



Dr. Éthelle G. Lord: Founding President, International Caregivers Association, LLC(ICA) and Master Dementia Coach

Dr. Éthelle Lord's vision is behind the creation of her world-wide Alzheimer's/Dementia-Friendly Health Care Workforce supporting both families and care providers. Passionate, diligent, and forging ahead despite established healthcare practices and regulations that do not work, her determination is to change the course of dementia care and long-term care conditions.

Having been there as her husband's caregiver for over twenty years, her unique but epic TDI Care PartnerSM program, as well as a dementia coach training program, supports her vision.

She presents workshops and speaks at conferences. She was an adjunct professor of Business at several universities in Maine and virtually. She presents on her model for creating an Alzheimer's Friendly Healthcare Workforce at dementia conferences. Dr. Lord is frequently interviewed on podcasts and television worldwide for her expertise. She obtained her Doctor of Management in Organizational Leadership (DM) degree from the University of Phoenix (2010).

Her prolific publishing includes articles, primers, and books. The majority of her writings cover practical issues regarding Alzheimer's and caregiving. *HOW IN THE WORLD... AND NOW WHAT DO I DO?* is an Alzheimer's primer published in four languages (English, Spanish, French and Arabic). It is digitally free of charge but at a small price for the hard copy in English.

She is the author of the book entitled *ALZHEIMER'S AND DEMENTIA COACHING: TAKING A SYSTEMS APPROACH TO CREATING AN ALZHEIMER'S/DEMENTIA-FRIENDLY HEALTH CARE WORKFORCE*, and a second edition. A third edition is already in progress and scheduled to be available in early 2025. Dr. Lord maintains offices in both Maine and California.

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Disclaimer

As a master dementia coach, the information being provided in this White Paper is for the purpose of informing the reader and those providing dementia care services.

The information is considered general information and intended for educational purposes only, it does not necessarily apply to any specific business, organization, or government agency in charge of providing memory loss services and care. It is not intended to constitute nor substitute existing memory loss services and care you provide. Instead, it is an introduction to a new framework that makes most former memory services and care obsolete while providing a more COST-EFFECTIVE business model of memory loss services and care.

If you are interested in upgrading from a care/medical model of memory loss and Alzheimer's care to a care/social community model of memory loss and Alzheimer's care framework, this White Paper is of relevance to you. Finally, the International Caregivers Association, LLC takes conflicts of interest very seriously. Any business, organization, company, or government agency requesting a personal consultation with Dr. Lord may do so by emailing her at directly Dr.Lord@dementiacarepartners.com.

Please let Dr. Lord know how she can review your current memory loss care and services program and suggest how the **Transactional Dementia IntelligenceSM model (TDI ModelSM)** may improve existing memory loss care/services, be more cost-effective, and create a community approach unlike any you have known before.

From Dr. Lord:

How may I help you to review your current memory loss care and services, care plan processes, retention of employees and family members, and any other specific areas of concern? Always seek advice from an experienced master dementia coach before making changes in your delivery of memory loss care and services.

Reserve a consultation with me today via email at Dr.Lord@DementiaCarePartnership.com

Thank you,

Éthelle G. Lord, DM

Founding President at the ICA
Creator of the TDI Model
Master Dementia Coach