

# 2008 LEADERSHIP AAHSA



## Transformational Learning in Action



# Leadership AAHSA Class of 2008

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# Welcome

## Welcome to the Leadership AAHSA Class of 2008!

In *Good to Great*, Jim Collins writes: “Greatness is not a function of circumstance. Greatness, it turns out, is largely a matter of conscious choice.” The decision of these fine Fellows and their sponsoring organizations to participate in the rigorous Leadership AAHSA program speaks to their sincere commitment to continuous quality improvement, both for themselves as leaders and also for our field. We need more leaders like these!

Recognizing the need for a new generation of transformational leaders in aging services and addressing the coming shortage of not-for-profit leaders nationwide, we launched Leadership AAHSA in 2007 to cultivate emerging leaders within the AAHSA membership. This publication catalogues the most important public manifestation of the program ... their action learning projects.

I would like to personally thank this year’s Leadership AAHSA Fellows and their sponsoring organizations for participating in this journey. Their passion for their projects, and the learning they acquired while working on this exercise, speaks volumes to their leadership gifts and potential.

Thank you, Fellows, for choosing greatness!

Sincerely,

William L. Minnix, Jr.  
AAHSA President & CEO

AAHSA extends deep appreciation to the following individuals and organizations that helped to financially sustain the Leadership AAHSA Class of 2008. This groundbreaking endeavor would not be possible without their ongoing support.

### Individuals

Kathleen Anderson – in honor of everyone on the AAHSA staff  
Alexandria, VA

### Organizations

- |  |  |
|--|--|
| American Baptist Homes of the West (ABHOW)<br>Pleasanton, CA | Holleran<br>Mountville, PA   |
| Anabaptist Providers Group (APG)<br>Lititz, PA               | Jewish Home Lifecare<br>New York, NY   |
| Bethesda Health Group<br>Saint Louis, MO                     | The Kendal Corporation<br>Kennett Square, PA                                   |
| Christian Church Homes of Northern California<br>Oakland, CA | Northern California Presbyterian Homes and Services, Inc.<br>San Francisco, CA |
| Christian Living Communities<br>Greenwood, CO                | The Meth-Wick Community<br>Cedar Rapids, IA                                    |
| Covenant Retirement Communities<br>Chicago, IL               | Total Longterm Care<br>Denver, CO  |
| Hebrew Home for the Aged<br>Bronx, NY                        | Trinity Senior Living Communities<br>Novi, MI                                  |

**For information about how to donate to the Leadership AAHSA Class of 2009, please contact us at (202) 508-9460.**

2008

## Cultivating Emerging Leaders in Aging Services

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The **Leadership AAHSA** year-long learning experience offers a variety of challenging and engaging activities:

- **Face-to-Face Learning Opportunities** include facility tours and intimate conversations with aging services leaders, through which Fellows are immersed in the leadership capacities that enable transformation, innovation and person-centered care.
- **Virtual Peer-to-Peer Interactions** facilitated by an online learning community and monthly conference calls that foster continued sharing and engagement among the Fellows, faculty and coaches.
- **Leadership Theory** from a wide range of authors and experts to generate discussions about the practical connections to our field, including emerging trends and important policy issues.
- **Self-Evaluation Exercises** that encourage introspective reflections of personal leadership and learning styles, revealing the powerful relationship between self-awareness and transformational leadership.
- **Action Learning** provides fellows with an opportunity to reflect on their growth as leaders and experiment with their expanding knowledge, perspective and skills.

### Apply to Leadership AAHSA

Applications for the Leadership AAHSA Class of 2010 will be available in the spring of 2009. Please visit [www.aahsa.org](http://www.aahsa.org) for more information.

## Action Learning Projects

The Leadership AAHSA Fellows’ year-long experience culminates in an action learning project designed to advance the sponsoring organization’s mission by making progress toward an innovation or best practice that will impact the individuals it serves and, ultimately, the aging services field.

This action learning process requires that Leadership AAHSA Fellows continuously learn and put into practice the critical leadership skills that foster transformational ideas and organizational change.

All Fellows were asked to explore the following questions related to their action learning projects and Leadership AAHSA experience:

- Describe the links between your project and the core tenets of Leadership AAHSA, what drew you to your particular subject matter and what difference you hope it will make to the field of aging services.
- How have the relationships you developed with mentors, partners and stakeholders influenced the direction of your action learning project and your development as a leader?
- What have been important turning points in your own learning and as you worked on your action learning project?
- How do you hope your action learning project will unfold in the months and years ahead?
- How have specific aspects of the Leadership AAHSA program and your action learning project influenced your learning experience?

Their insights and observations are compiled in the following pages...

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# Anderson



## **Matthew Anderson**

Administrator  
The Osborn  
Rye, NY

## **Transforming Care for Dementia Residents in a CCRC**

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Matthew is administrator of The Osborn, a continuing care retirement community (CCRC) in Rye, NY, where he lives with his wife Christine and sons Ryan and Aidan. He started as an administrator-in-training in 1992 at Wesley Health Care Center and in 1998, joined The Osborn management team. Matthew holds a bachelor's degree in health administration from Penn State and an MBA from SUNY Albany. He serves on the Operations Committee of the New York Association of Homes and Services for the Aging (NYAHSA) and a variety of community boards and is an active youth baseball and soccer coach. Matthew received NYAHSA's 2008 Thomas Clarke Memorial Award - New York State's Young Administrator of the Year Award.



## **Innovation, Person-Centeredness and Transformational Leadership**

As dementia increases among our seniors and as they wish to age in place in the least-restrictive environment, CCRCs will need to move away from traditional care models and learn to care for dementia residents seamlessly in and throughout all levels of care (independent, assisted, skilled). By coordinating across all levels (education, assessments, activities and support programs), we will provide a seamless environment of care, reducing anxiety and stress for both families and caregivers, while providing a more person-centered approach for our residents. This program will require transformational leadership to break down traditional barriers while bringing innovation to CCRCs.

## **Leadership Influences**

I've been blessed with many people in my life who continuously nurture my growth both personally and professionally. During this project, several staff, residents and family members have taught me to stretch my thinking, to listen and not judge, to question and not give answers, to step out and trust my abilities. Most of all, they have taught me it's better to make a decision, be wrong and learn from it than it is to make no decision at all. My mentors are my greatest critics, they are my guide and inspiration, and I would not be where I am today without them.

## **Turning Points**

Realizing that everyone on campus wasn't as passionate as I am about coordinating dementia care was a true turning point for me. I'm learning that doing anything visionary or of value is always challenging. As involvement among staff increases through education and coaching, ownership among the team members has occurred, creating lots of energy and excitement. Sustaining this energy during a lengthy project is daunting; therefore, we've broken the project into baby steps and celebrate each step along the way. As a team, we have continued to learn and grow from one another for the benefit of all.

## **Moving Forward**

The next year will be difficult in building support and structure for the project across all levels. It will require stepping back and reflecting on what we want to create with our stakeholders and then breaking down the traditional CCRC model where different levels of care operate in silos. Through education, active listening, teamwork and coaching, we will build momentum to create the CCRC of the future that will support our increasing dementia population, families and staff.

## **Key Learning**

My Leadership AAHSA experience has been amazing! The talented faculty and design team has inspired me to become a transformational leader and reflective learner through readings, discussions, site visits and interactions with leaders from our country's most innovative service organizations. I've learned the art of framing better questions and the value of looking through other people's lenses. I've personally moved out of my comfort zone of acceptance and have begun questioning all we do. Most importantly, I will forever cherish the relationships I've formed with my Leadership AAHSA Fellows and look forward to our journey together in moving the aging field forward.



**Janelle Ansell**

Administrator  
The Kenney  
Seattle, WA

# Ansell

## **Transforming to a Person-Centered Environment**

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**(via Physical Structures and Staff Enhancement)**

Janelle is a service-oriented professional with more than 15 years of management experience in not-for-profit settings. She started as The Kenney's first director of human resources and was promoted to assistant administrator and then appointed administrator in 2008. Working in aging services has allowed Janelle to grow both personally and professionally. She has been a certified professional in human resources since 2000 and a licensed nursing home administrator since 2005.

## Innovation, Person-Centeredness and Transformational Leadership

The skilled nursing area of our community is representative of a medical model nursing unit where staff delivers care in a task-oriented mindset. My focus is to enhance both the physical environment to create a home setting, as well as to instill greater staff leadership and a stronger focus on person-centeredness. Enhancing each individual's physical space to make it more personal provides them with a greater sense of comfort, ownership and control. Training staff to understand and implement the steps of person-centered leadership through the tasks of caregiving continues the celebration of each resident's individualism. Each staff member who incorporates person-centeredness influences others to do the same.

### Leadership Influences

I have learned to take more time by stepping back, processing and analyzing situations and opportunities, instead of feeling compelled to take immediate action on my own. By watching and learning from the styles, trials and accomplishments of other leaders, I have learned to ask myself, "What has worked for others in a similar situation and why?" I have focused on the root of challenges presented and worked to involve those around me in determining how best to respond. Involving others takes more time but allows them a greater sense of involvement and ownership.

### Turning Points

I gave birth to my daughter while working on this project. This was both a challenge and a turning point for me in many ways! During my leave of absence, I felt disconnected from work, yet time away also afforded me the opportunity to slow down and process my leadership decisions and actions. Like many staff, I find myself being task-oriented in numerous situations and striving to get projects done without enough regard for the process. I am learning that taking more time to enjoy the tasks can be beneficial for myself, others and the tasks themselves.



### Moving Forward

Because the focus of the project is person-centeredness, the opportunities to incorporate it are many and will continue to present themselves. Person-centeredness is a simple way of reminding us of the purpose of each task, project or program. Who are the people affected? How do we know what they want or need? How do we go about learning what opportunities exist and when or how we adopt them? I hope to see more resident-led programs, stronger leadership from line staff, career ladders and more decisions made not only on behalf of others, but in consultation with them. I plan to meet with staff regularly to discuss the opportunities they would like to have addressed and the ways in which we can collaborate toward continued improvements.

### Key Learning

I particularly enjoyed the site visits and the group discussions held among the leadership program participants. This program has provided me the opportunity to be around others in the aging field, to see them in their environments and to appreciate their own knowledge and experiences. The openness, willingness to share highlights and pitfalls and the inspiration I received from others encourage me that our collective purpose and mission is ever present—continuously challenging and tremendously rewarding.



## **Holly Argent-Tariq**

Chief Executive Officer/Administrator

St. Mary's Center

New York, NY

## **End-of-Life Empowerment**

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Holly joined the St. Mary's AIDS Center in 1996 as executive director of the adult day health care program. In 1999, she was promoted to the position of chief executive officer/administrator with overall responsibility for the skilled nursing facility and the adult day health care program. She holds a bachelor's degree from John Jay College of Criminal Justice and a master's degree in community health and health administration from Long Island University. She is married to Ahmed, a retired NYPD lieutenant, and is the mother of Yasmin and Hasan.

# Argent-Tariq

## Innovation, Person-Centeredness and Transformational Leadership

St. Mary's is an organization dedicated to serving people living with HIV and AIDS. Death is a facet of our reality. The processes in place to handle death and dying seemed sterile and artificial. By creating a powerful role for residents in the nursing home, they can participate in comforting their fellow residents and friends during the dying process and gain personal insight and a sense of empowerment. This empowerment is transformative in that it changes the way the organization views end-of-life. We open up the journey, allowing greater participation from the community. It is patient-centered because residents are at the core of the effort. Residents who are at the end of life and those who are comforting them share a bond. It is innovative because the residents participating have been trained in various components of death and dying. They receive ongoing support from the staff.

## Leadership Influences

During the development of this project, I have had the opportunity to work closely with Chaplain Dan Shenk, who serves as my mentor. We have increased our interaction and meet for at least an hour each week to discuss the project. This has matured into a deeply respectful relationship where I have gained insight into the importance of spirituality in a resident's life and in their dying. Sharing stories about grief, sadness and missing loved ones has strengthened the bond between me and the residents. It also has served to humanize the staff in the eyes of residents.

## Turning Points

The willingness of our residents to step forward and assume leadership roles when other residents have become ill has been a tremendous surprise. They have visited their neighbors in the hospital and also have reported changes in a resident's appearance or cognition to nursing. The pride that I see in the small delegation of *St. Mary's Angels*, as they are called, is immeasurable.

## Moving Forward

In the coming months, more residents will seek training and play a part as *St. Mary's Angels*. Already the angels have coordinated the funeral of one of the residents. They helped write the obituary and spoke at the funeral. This can be amplified and include comforting the families who are in grief over the loss of a loved one. This can be replicated as a component of culture change in other organizations.

## Key Learning

I have learned how to listen and how to ask questions. The ability to listen appreciatively without waiting to jump in is an essential aspect of leadership. Working with such a dedicated and talented design team and faculty has been an honor. The serendipitous good fortune of being part of the "Mixed Nuts" team has had a monumental impact on me. They are generous with their hearts and their minds. What a blessing to be in their company.



# Barker



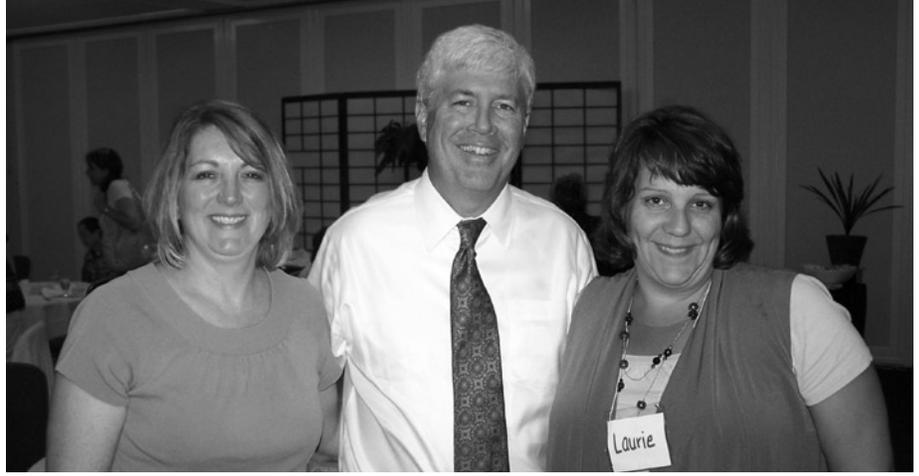
## **Dawn Barker**

Vice President of Human Resources  
RiverWoods at Exeter  
Exeter, NH

## **Performance Potential**

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Dawn has had the privilege of being part of RiverWoods at Exeter, a CCRC located in Exeter, NH, for the last eight years. She received her nursing home administrator's license and SPHR credentialing from the Society of Human Resource Management. Dawn has a bachelor's degree in organizational leadership and is currently pursuing her master's degree in the same discipline. She has lived in New Hampshire for the majority of her life and never plans to leave. Dawn shares her life with her husband and two daughters. She loves to learn new things, read, cook and spend time outside with her family.



### **Innovation, Person-Centeredness and Transformational Leadership**

I am very passionate about creating an environment in which employees can achieve their maximum potential. My action learning project created a pay-for-performance system that will move RiverWoods at Exeter away from the traditional model where “the manager speaks and the employee listens” to an inclusive, two-way development dialogue. The performance management system is based on “the measurement of success” for each individual and is derived from a competency model for each position. By creating a culture that supports development of people, we will achieve and enhance greater employee satisfaction, which will directly impact resident satisfaction.

### **Leadership Influences**

A taskforce—consisting of an outside consultant, managers, staff from across the organization and myself—was created to provide a formal communication link to all employees. I learned that asking the right questions and then listening to the answers is very important. As a leader, you do not need to have all the answers, you just need to listen and encourage people. Through input and challenges from the taskforce, the end product was different from my original vision. It differed in how individual goals are developed and how those are linked to annual merit increases.

### **Turning Points**

A turning point for me was when I realized the project was never going to get off the ground unless I let it “get messy.” I had perfection paralysis—I thought it needed to be perfect before it even got out of the gate. It was very liberating when I first met with the taskforce and realized they had ideas of how the project should look. They sought feedback from staff and advocated for the tools to reflect what the majority of staff wanted. I feel the project would not have been successful without the taskforce.

### **Moving Forward**

I hope the performance management system leads to RiverWoods at Exeter becoming a “learning” organization. I am starting to develop *RiverWoods University*, which will offer development pathways for staff to help them reach their maximum potential. *RiverWoods University* will allow RiverWoods to retain and develop talented staff, which is essential to our success and will help us meet the needs of our residents and the strategic objectives of the organization. The performance management system will be successful in the coming years when each staff member has reached his or her own “measurement of success.”

### **Key Learning**

The “Rule of Six” and “Leading with Questions” were two leadership theories that really influenced me during the action learning process and during my Leadership AAHSA experience. I have learned to look at things in different ways, to not make judgments but be open to other possibilities. I also have learned the power of asking “softball” questions that only the other person can answer. It connects you to other people. My biggest take-away is learning that I am a work in process. Leadership is a journey, not a destination. I will continue to enjoy the journey and pursue my “True North.”



## **Colleen Bloom**

Associate Director for Housing Operations  
American Association of Homes and Services for the Aging  
Washington, DC

# **Addressing Workforce Recruitment/Retention Challenges By Helping Them Meet Their Own**

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Since 1995, Colleen has been the American Association of Homes and Services for the Aging's (AAHSA) primary resource on subsidized senior housing operations, working with national-level Department of Housing & Urban Development (HUD) program staff and AAHSA members on regulatory compliance issues. Colleen began in the aging services field working at a HUD-subsidized senior housing community owned and operated by an AAHSA member in California. She serves on the board of a subsidized Maryland member community that offers some services. Colleen received her bachelor's degree in English from the University of California, Irvine in 1987, then taught English in Botswana, Africa as a Peace Corps volunteer. She loves outings with husband and daughter in the URAL, the family's side-car motorcycle.

# Bloom

## Innovation, Person-Centeredness and Transformational Leadership

I have personal and professional experience in the value of working with seniors and the challenges of making a salary sufficient to meet the very real stresses of living paycheck to paycheck. Person-centered care should include the persons who are providing the care, as well as those receiving it. I will identify AAHSA members already working to help their staff meet housing and/or transportation cost challenges. By doing so, I hope more long-term care organizations may be inspired to distinguish themselves as employers of choice by showing they value quality of life for their workforce as much as for their residents/clients.

## Leadership Influences

I began with the “plain-vanilla” goal of “articulating the vital linkage between housing affordability and long-term care workforce recruitment/retention efforts.” Expanded interaction with external participants added the related dimension of transportation costs (then gas prices spiked), challenged my assumptions, the way I was approaching the issue, the mechanisms by which I tried to engage my mentor and the stakeholders I was speaking to. The broader the circles of dialogue, the greater the opportunities were for more broad-based collaborations. The greater the effort to engage assorted individuals in the discussion, the more rich the experience became. I had been limiting myself without realizing it.

## Turning Points

What I initially perceived as a lack of interest, even a judgment against the value of my questions or myself as a person, was in fact a lesson on the value of persistence and trying different approaches to engage people in the dialogue. The definition of insanity, it is said, is doing things the same way and expecting a different result. I learned to try different ways of doing things and got results that far exceeded my expectations. I also learned that it’s important to ask questions with clarity; otherwise, you can deprive others of the opportunity to share a gift.



## Moving Forward

I hope to identify additional best practices and innovative ways that members are helping their workforce address their basic survival challenges, to evaluate (if possible) the costs/benefits of various models and to show how such efforts actually impact recruitment/retention. Hopefully, one or a series of articles will be developed to share member efforts to meet the needs of their clients/communities in terms of staffing and community development, with a loyalty bonus. I also hope to deepen my relationships with experts in the field who know so much about this already and have so much to share.

## Key Learning

This has been a very energizing and inspirational year—a truly amazing exploration into the best thinking and concepts in leadership today, with the immense benefit of working with a group of similarly oriented colleagues who rapidly have become friends and lifelong networks of learning and support. I particularly enjoyed the Leaders in Residence activities, Leadership AAHSA’s version of speed dating. I’m thankful for the diverse experiences and their equally diverse connections. The entire program has helped to enrich my life and my thinking and to challenge me in my role of articulating a compelling vision of aging services in the future.



**Denise Boudreau-Scott**

Planetree Continuing Care Specialist  
United Methodist Homes  
Shelton, CT

# Boudreau-Scott

## Creating a Planetree Continuing Care Advisory Council

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Denise recently transitioned to the role of Planetree Continuing Care specialist with United Methodist Homes (UMH). Previously, she served as administrator of Bishop Wicke Health Center/UMH. While there, Denise lived her dream of serving the residents and staff of an innovative and progressive community. In her new role, she hopes to help other individuals achieve and sustain their own dreams. Denise received her master's degree in health administration from Cornell University in 1994, and her bachelor's degree in gerontology from the University of Scranton. She loves traveling with her husband and twin boys, especially to Disney World.

## Innovation, Person-Centeredness and Transformational Leadership

Planetree, a not-for-profit membership organization, began in 1978 in hospitals as a patient-centered care model. Over the last seven years, Planetree and United Methodist Homes worked to adapt the model to continuing care settings, where it evolved into a relationship-centered philosophy. Planetree Continuing Care focuses on relationships between all members of a community, including residents, staff and loved ones. Its purpose is to help sustain a healthy and meaningful life for all those who live, work and visit Planetree communities. Planetree provides a foundation for transformational change and performance improvement. Planetree encourages individuality while accelerating innovation within each community.

## Leadership Influences

The advisory council will be made up of national leaders in the post-acute care field, including representatives from government, academia and the network of provider organizations. This influential group will establish the designation process for Planetree Continuing Care affiliates. Over a three-year pilot study, the committee will identify criteria and validate its use through qualitative and quantitative data analysis. Planetree has taught me the importance of putting relationships first. This project builds upon that lesson by forming relationships that will broaden our perspectives and assist us in supporting the needs of all of our community stakeholders.

## Turning Points

The achievement of a grant from the Rothschild Foundation was an important turning point in the creation of the advisory council. The grant allowed this project to proceed by limiting the financial impact on council members or their organizations. One insight that emerged during my work with other Planetree organizations was when I saw that there is no one “right” way to lead others. Rather, it has become clear to me how an organization’s unique circumstances require a leader who meets that set of circumstances at that particular point in time.

## Moving Forward

Recognizing the scope of work that needs to be accomplished, the advisory council will meet quarterly over the next three years. During this period, the group will seek to refine the designation process to meet the needs of continuing care organizations, select pilot sites to define and validate the model, evaluate Planetree Continuing Care membership benefits, identify measurement tools to assist with monitoring progress and review initial trends and findings from pilot sites. Through the above work, I hope that Planetree will continue to be a vehicle to accelerate innovation in communities while honoring the uniqueness of different organizations.

## Key Learning

The Leadership AAHSA readings and discussions were particularly beneficial. I was struck that there were many common themes that weaved through the books we read and those that I was reading independently. I was able to incorporate the theories from books we read, particularly *Good to Great*. Many of the organizations I encounter are truly on a journey from good to great, seeking to improve their already strong community by incorporating the components of Planetree. My action learning project brought to life the leadership theories I was exposed to and has allowed me to understand the uniqueness of organizations and individuals.



# Bowell



## **Denise Bowell**

Executive Director of Affordable Housing  
Episcopal Retirement Homes  
Dayton, OH

## **“Living Well Hall of Fame” Annual Induction Dinner**

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Denise has served the elderly for her entire 33-year career. She began as a nursing assistant in long-term care while attending college to earn a bachelor’s degree in social work from Wright State University. Following graduation, she continued in the nursing home environment as a social service director. Following three years as an adult protective services case manager, she was hired by Episcopal Retirement Homes (ERH) as director of Canterbury Court, an affordable housing community for seniors. Her passion for serving seniors in affordable housing continues through a recent promotion to executive director of affordable housing for ERH.

## **Innovation, Person-Centeredness and Transformational Leadership**

The “Living Well Hall of Fame” Annual Induction Dinner was an answer to our question of how to honor our long-time volunteers and board members and promote our brand “Living Well into the Future.” This is an innovative way to honor seniors who exemplify “Living Well.” The transformational response we expect is to influence and educate other older adults to begin to take an interest in their own six dimensions of wellness and to begin to change the negative view our society has of older adults. This is person-centered because each inductee will have a different life story about how he or she has met individual wellness needs and wants.

## **Leadership Influences**

The project sponsor challenged me to work outside my area of expertise. This is leading me to work with many different disciplines within our organization, which is exciting and an opportunity to learn other skills. I have been amazed at how quickly the excitement is building around this project. The ideas that the committee members are sharing are enhancing this project beyond my original expectations. This has further influenced me as a leader about the importance of “getting the right people on the bus” and staying out of their way.

## **Turning Points**

My crucible moment came when I tried to develop two other project ideas before deciding on this one. It was a challenge for me to create a project that met the Leadership AAHSA requirements, that was achievable and would benefit my organization and the field. This seemed a daunting task as first. With the encouragement of my sponsor, I continued to search for a project that would meet all of these requirements.

## **Moving Forward**

Our hope is that this event will become more popular each year, something that attendees look forward to and that the excitement builds around the nominating process. We expect to showcase the fact that seniors can be and are contributing members of our society and our ERH communities. We hope to educate and influence others about the six dimensions of “Living Well.” The annual dinner also will serve as a fundraiser for our affordable housing communities. If successful, we plan to duplicate this in the different regions we serve.

## **Key Learning**

Of the many things I have learned from Leadership AAHSA, there are a few in particular that stand out. First, “listening is not waiting for your turn to talk ... always be in the moment.” Next, feeling comfortable with the fact that plans do not need to be perfect before you roll them out. As this annual induction dinner ages, I envision improvements every year based on our experiences at each dinner. The book *Good to Great* influenced how I lead in my day-to-day activities. Continuing to give credit to those around me has increased and maintained their commitment to our ministry.



**Nancy Burton**

Charitable Giving and Volunteer Services  
Crest View Senior Communities  
Columbia Heights, MN

## Embracing and Appreciating the Gifts of Time, Talent and Treasure

Nancy has had the opportunity to serve Crest View Senior Communities since January 2006. Beginning as a personal care attendant in 1992, she has been working in the field of aging services ever since. Nancy has a bachelor's degree in psychology with a minor in gerontology. Nancy and her husband Jason have three children: Shayne, 14, Elise, 5, and Elijah, 2. She enjoys playing with her children, camping, reading and gardening.

# Burton

## Innovation, Person-Centeredness and Transformational Leadership

Being a thoughtful steward of my time, talents and treasures has been an integral part of my life since youth. My action learning project is carrying forth those principles by helping volunteers and donors realize the gifts they have to share, followed by helping them realize the fullest potential of those gifts within our field. This will be accomplished through discovery interviews and matching those skills and resources with the needs of our organization. I think this is an innovative way of enhancing our community, assisting our workforce and building upon person-centered care.

## Leadership Influences

I am developing relationships with our current volunteers and donors and inquiring about how they use their time, talents and treasures. This has opened the door to discussing the goals and aspirations for our organization. These open-ended questions bring out stories of passion for our organization that only those individuals can answer. Asking about individuals and their involvement with our organization exposes their level of dedication and brings about an even higher commitment toward the organization's goals.

## Turning Points

This project took a different turn as I was given the opportunity to coordinate our volunteer efforts. My challenge was to integrate the charitable giving efforts along with volunteerism. Giving to Crest View Senior Communities was the common thread. From that point, the goal was integration. My challenge will be to keep meeting with volunteers and donors face-to-face and ask what their volunteer and philanthropic wishes are for their gifts of time, talent and/or treasure.

## Moving Forward

I hope the discovery questions for the volunteers and donors will become more of a natural unfolding of a story, one of giving back to an organization that has made an impact in their lives. I believe these stories are the common thread of our human spirit of appreciation for each other and the ultimate good that we strive toward.

## Key Learning

My leadership is a work in progress. Leadership AAHSA has allowed me to take the essential time away from my regular schedule to reflect, journal, network and experience new environments while growing by leaps and bounds in finding my "True North," described by Bill George in his book *True North: Discover Your Authentic Leadership*. George also shares that "the hardest person you will ever have to lead is yourself." However, by leading with questions and considering the "Rule of Six," I have become more appreciative of the situations and conditions around me.





**Ann Conn**

Chief Financial Officer  
A.M. McGregor Home  
Cleveland, OH

## Turning Treasures into Futures

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Ann is chief financial officer of the A.M. McGregor Group in Cleveland, OH. She began her career in public accounting and transitioned into aging services in 2003. Later, she joined McGregor where she shares the responsibility with the CEO and COO for optimizing McGregor's human, financial and capital assets in service to its mission. Ann holds a bachelor's degree in business administration from Youngstown State University and is a certified public accountant. She has presented for the Ohio Society of CPAs and is active in her local church. She and her husband Paul have two children, Mason and Madison.



### **Innovation, Person-Centeredness and Transformational Leadership**

I was drawn to this project because I see two great needs in our community—a shortage of qualified health care staff who desire to work with seniors and a catalyst to move teenage persons into advanced degrees past high school. McGregor will establish an endowment through the sale of donated valuables that have been in storage for years. The fund will support high school students who volunteer at McGregor and assist in developing innovative intergenerational programming. The goal is to engage young people to work with seniors in a care setting that may not have been their first choice.

### **Leadership Influences**

I was fortunate to have two mentors during this project—Rob Hilton, McGregor Home’s CEO, and Paul Conn, my husband. Rob empowered me to move forward with this idea in an organization that is already giving back to the community and provided much-needed feedback when questions arose. He continues to ask questions and encourage me to broaden my range of focus when considering how to establish the program. My husband challenges me to focus on service and the individuals who will benefit for many years to come. He is my sounding board and grounding influence.

### **Turning Points**

One turning point would be a transition in leadership and direction at McGregor. McGregor is moving from an internal focus to a community and industry focus. This transition is providing new opportunities to reach outside of the organization and collaborate with other community providers. I continue to learn to draw upon the strengths of the team around me and look for where the passions align for my staff. I am excited about the possibilities and creativity that will come from our affiliations with local schools and the Boys and Girls Clubs of Cleveland.

### **Moving Forward**

I hope this project will encourage teenagers to volunteer in senior settings. Our first class of scholarship recipients will receive their awards in May 2009. We plan to grow the fund by \$10,000 each year through fundraising and increase the number of students we support. Once we have developed the program, process and materials, I would like to share it with other nonprofits, so other organizations can replicate the program. We have a tremendous resource that many organizations have left untapped—our volunteer base. These people are another underutilized resource.

### **Key Learning**

Leadership AAHSA has given me an avenue for professional growth, exposure to different ideas and structures for care delivery and a tremendous network of talented individuals in the field of aging. The design team created an atmosphere of open dialogue and challenged the Fellows to reflect on observations before drawing conclusions. The program provided concepts and practice with framing questions through both our site visits and the Leaders in Residence dinners. Most of all, I value the lifelong relationships I developed with people who are passionate about serving seniors.



**Christina De La Torre**

Regional Property Supervisor  
TELACU Residential Management  
Los Angeles, CA

# De La Torre

## **Team Leaders: Taking Leadership to the Next Level**

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For two years, Christina has served as a regional property supervisor for TELACU Residential Management (TRM), a not-for-profit entity that provides property management services for TELACU's affordable housing portfolio, including two 543-unit residential housing facilities for the elderly and disabled. Christina received her bachelor's degree in history and political science from the University of California at Los Angeles. She also holds a master's degree in politics, economics and business from Claremont Graduate University. Christina also serves as a board member for Whittier Christian High School, a not-for-profit Christian school in La Habra, CA.

## **Innovation, Person-Centeredness and Transformational Leadership**

Great leadership is driven by person-centered care—that is, creating passion and purpose in the workplace and creating an environment that promotes ongoing personal growth and innovation. Like Leadership AAHSA, it is TRM's mission to empower ongoing transformational leadership and learning in all the communities that we serve. Consequently, TRM saw a need to create team leaders among resident managers who can be empowered to train and support the development of new staff. These team leaders are not only supporting management to ensure that duties are fulfilled, but they are, in turn, empowering themselves by advancing in their careers.

## **Leadership Influences**

Transformational leadership can be effective only if you have a great team in place. This team needs to be supportive, accountable, self-disciplined, trustworthy, optimistic, innovative and empowering. I have such a team, which includes my mentor and fellow supervisors, who have actively guided, supported and encouraged me throughout my action learning journey. Their transparent and authentic feedback has allowed me to evaluate my project through a different set of lenses that I may not have considered before. Further, their commitment to the successful fulfillment of this project has given me access to achieve higher levels of leadership and personal growth.

## **Turning Points**

Although the corporate staff is committed to the fulfillment of this project, the field staff, who are the actual implementers of this project, also need to share this vision of transformational leadership. Consequently, I have realized that I need to be the source for creating this shared vision. This demands having a generous listening for my own feelings and for the feelings of all my team members. By connecting to this emotional intelligence, the vision transforms into action which, in turn, creates successful results. To achieve this connectivity, it will require me to generate a new level of leadership.

## **Moving Forward**

In addition to selecting the new team leaders, management needs to create an ongoing training program that will support them to be effective in their new roles. This includes in-depth training with all departments to strengthen their management and leadership skills, empowering them to take pride and ownership in what they do and promoting an environment where they can achieve professional growth. Thus, I also would like for these new leaders to get more involved in our state association, Aging Services of California, participating in its educational programs, sitting on committees and becoming advocates for aging policy.

## **Key Learning**

Every aspect of Leadership AAHSA has influenced my learning experience with my action learning project. I especially took hold of the idea of listening as an anthropologist, which is the ability to step back, listen generously to conversations, reflect on what you are observing and learning and share those observations with others. This practice has allowed me to really listen to the needs of my organization, which is where my action learning originated. Likewise, working on my project has forced me to actively engage with the Leadership AAHSA coaches as challenges arise and as I have identified what's missing in my own leadership.



## **Todd Engle**

Health Services Administrator  
Friendsview Retirement Community  
Newberg, OR

## **Career Pathways**

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Todd has served in long-term care since 1982. He obtained a bachelor's degree in music therapy from Willamette University in 1986. In the mid 1980s, he and his wife worked to develop one of the first Alzheimer's care units in Oregon. They also started Northwest Music Therapy Services, which provides music therapy to residents of nursing homes throughout the Portland area. Todd has worked as both a nursing home and assisted living administrator. Since January 2004, he has served as administrator for Friendsview Retirement Communities clinic and three licensed service areas, including intermediate, residential and dementia care units.

# Engle

## Innovation, Person-Centeredness and Transformational Leadership

A visit with Chemeketa Community College staff resulted in an opportunity to collaborate by providing a nurse instructor and utilizing college classroom space and student recruitment capabilities. This resulted in a high-quality CNA training program that equips students with skills that can serve as a stepping stone toward careers such as doctor or nurse. Being the “Best Place to Live and Work” and offering “Lifelong Learning” helps fulfill our organizational vision. This program is transformational, person-centered and innovative as it starts future health care workers on a pathway to a career that may have seemed beyond their reach.

## Leadership Influences

This project has created much excitement. We plan to continue the class twice a year. College, high school and Friendsview staff were asked to present at a state workforce development seminar and were well received. All participant reports are positive, and plans are underway to expand our offerings to other jobs like certified medication and/or restorative aides. I am realizing as a leader that ideas are like seeds. Not all of them grow. But when they do, just a little tending will cause them to flourish effortlessly. Time is better spent on these projects than on projects that have not germinated.

## Turning Points

What surprised me most was how quickly the first program came together and took on a life of its own. In *Good to Great*, Jim Collins spoke of having the right people on the bus. I believe the success of this project was due to the right people being in the right seat. The Chemeketa Community College staff was so helpful with organization and making contact with the high schools. Our nurse was already skilled at teaching and clinical operations and was ready to go with educational materials. The only work for me was to support the process.



## Moving Forward

I hope this will be one of many collaborative partnerships with local learning institutions. Our collaborative list of participating nursing, social work and psychology programs could grow to include culinary, finance, electrical, plumbing and administration. Creating a list of scholarship opportunities for current and potential employees might help participants find financial sources for their dreams. We hope to create literature and a video that show the opportunities for learning and growing in the field of long-term care. These future health care leaders will gain experience that will help them realize the fulfillment that comes with serving elders.

## Key Learning

In *Good to Great*, Jim Collins introduced the “Hedgehog Concept” the focal point of passion, what you can be the best at and what drives your economic engine. Although lifelong learning is not our hedgehog concept, it is close enough to show the power of matching an idea with a concept. We are passionate about learning. We can be the best collaborators with local learning institutions. Creating a culture of learning lowers turnover which, in turn, improves financial and social standing. Leadership AAHSA has given me concepts that provide a framework for this and future projects that come my way.



**Elizabeth Fennik**

Director of Congregate Services  
Westfield Senior Citizens Housing Corporation  
Westfield, NJ

# Fennik

## “Know Your Neighbors:” Creating Community Through Collaboration

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Elizabeth joined the Westfield Senior Citizens Housing Corporation (WSCHC) in 1998 as director of the congregate housing services program with 17 years of experience in medical social work primarily in hospice care. She received her bachelor’s and master’s degrees in social work in Miami, FL. Elizabeth is a member of the Academy of Certified Social Workers with a New Jersey license in clinical social work. She serves on the board of the New Jersey Society for Social Work Leadership in Health-care and is a committee member with Rutgers University NJ-ELNEC. Elizabeth’s most recent accomplishment was receiving the 2007 New Jersey “Hospice Social Worker of the Year” award. She has four children and enjoys any adventure!

## **Innovation, Person-Centeredness and Transformational Leadership**

New Jersey has an exciting community-based program known as the Congregate Housing Services Program (CHSP). I was drawn to this project after administering the CHSP for 10 years. I have a passion for program development and recognized a need to expand services within a program already limited by funding. My project has two components—expanding existing subsidized services in affordable housing and developing the program into neighboring communities. Service expansion will result from collaborative efforts with neighboring schools, academic institutions and health care providers. The goal is to keep people in their homes and neighborhoods. This already person-centered idea offers innovation and transformation for WSCHC.

## **Leadership Influences**

The relationships with my mentor, stakeholders and community agencies have strengthened throughout the action learning process. I am surrounded by wisdom and colleagues who ask wise questions. Recognizing that the demands for both subsidized housing and subsidized services continue, new ideas have been met with excitement and passion. We are constantly faced with the complexities of our aging population and, as a leader, it is important to identify and validate common core values of the organization. These relationships with formal and informal leaders will help me strengthen my skills at leadership to effect the transformation we are seeking.

## **Turning Points**

A crucible moment for me was the realization that my passion and vision for service expansion was shared with the stakeholders. I had buy-in to ideas and support to develop strategic direction for the future of the organization and the aging population. Shared vision and values were present. More was coming, and we were going to shape the future of aging services. My experience with end-of-life care brings an urgency to address challenges. My challenge with this project will be the time it takes to allow the program to evolve. The journey will be my reward.

## **Moving Forward**

The program is still in its conceptual phase. I envision a process where we will use a collaborative approach with other sectors exploring ideas and funding mechanisms. This has proven to be a worthwhile program that has served our community in an affordable way. Listening to the needs of residents, families and community while keeping current with trends and technologies is vital. A realization of funding opportunities and development of a business plan to keep services affordable are the goals. Evaluating existing models and piloting programs will result in the development of our own unique model to be used as a demonstration site.

## **Key Learning**

Leadership AAHSA has provided me with an opportunity unmatched by any previous endeavor. All teaching aspects had an impact on my learning experiences and development of my project. It has influenced me personally and professionally in the areas of introspection, insight and innovation. Site visits allowed me to witness transformation, person-centered care and innovation. The Leaders in Residence who shared “successes” and “failures” renewed my passion and belief in “Authentic Leadership.” The most valuable take-away has been the people of Leadership AAHSA 2008 who so willingly shared their talents, torments, tears and friendships throughout the year. Reflect, take action, witness the surprises!

# Grant



## **Jonathan Grant**

Executive Director

Tryon Estates/ACTS Retirement-Life Communities, Inc.  
Tryon, NC

## **Repositioning Tryon Estates for The Next Generation of Residents**

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Jonathan serves as executive director of Tryon Estates. He has over 24 years of experience in the retirement and health care industries. Jonathan joined ACTS Retirement-Life Communities, Inc., as a busboy on Sept. 1, 1984, and has held various positions within the organization, including culinary director, administrator and director of community information technologies. Jonathan has a bachelor's degree from Florida Atlantic University and is currently working toward completing his MBA. Jonathan and his wife Anita have two children, Katelyn, 3, and Gavin, 5 months.

## Innovation, Person-Centeredness and Transformational Leadership

Repositioning our CCRC is crucial to the future success and survival of Tryon Estates. With an emphasis on person-based service delivery systems, the repositioned Tryon Estates will be designed to service a variety of different individual needs and lifestyles. The repositioning will have a large emphasis on creating various dining venues in all levels of service, including independent living, assisted living and skilled nursing. These dining venues will be flexible and cater to the individual needs of each resident. This project has a direct link to the Leadership AAHSA core tenets of moral and ethical leadership.

## Leadership Influences

The support and direction I received from my sponsor both challenged and encouraged me to expand my project beyond just repositioning the dining venues at Tryon Estates to repositioning the entire community. The process of meeting with my three mentors every two weeks greatly influenced the direction of the project and assisted in keeping it on course. These relationships helped me develop a style of leadership that became comfortable with consensus building.

## Turning Points

A key turning point in my learning while developing this project was when I realized the project was going in a different direction than I had anticipated. If I had not developed the working relationship with my three mentors, my project would have been more limited. The turning point came when I really started listening to my mentors' ideas and feedback and worked their ideas into my project. By utilizing the knowledge of my mentors, I realized that my project became better than anything I could have produced on my own.



## Moving Forward

My goal is to finish all of the plans for the repositioning of Tryon Estates within the next 12 months. It is my hope that my project will be utilized as the model to reposition Tryon Estates over the next five to 10 years, with each area being built into the Tryon Estates strategic plan.

## Key Learning

Both the site visits and interactions with Leaders in Residence greatly influenced my action learning. The site visits allowed me to take away different ideas from various locations. I was able to observe different best practices of service delivery models and implement them into my project. The interactions with the Leaders in Residence allowed me to ask key questions regarding their experiences in the field and apply their knowledge to my project. The action learning process enabled me to become a better leader and enhanced my learning experience with Leadership AAHSA.



**Adnan Hasan**

Executive Director  
Grand Lake Gardens  
Oakland, CA

## Applying Person-Centered Care Standards to the Total Continuum of Care

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Adnan serves as executive director of Grand Lake Gardens (GLG), an American Baptist Homes of the West (ABHOW) CCRC in Oakland, CA. He holds a bachelor's and master's degree in business administration from the University of Southern California. He worked in the corporate finance arena for many years before transitioning to senior care services in 2000. He serves on the finance and public policy committees of Aging Services of California (ASC), as treasurer of the Golden Gate Chapter of ASC and on a variety of community boards. He also actively volunteers his time to several different organizations.

# Hasan

## Innovation, Person-Centeredness and Transformational Leadership

The purpose of this project is to apply person-centered care standards developed by CARF-CCAC for skilled nursing facilities to the broader continuum of care, including residential, assisted living and dementia care. This project is innovative and requires transformational leadership because it requires creation of new processes while inspiring staff to a different vision of how GLG and ABHOW deliver services. I have developed a plan to change the programs, practices, services and physical plant to meet these standards. I anticipate that this process will provide valuable information to ABHOW and possible replication for other communities.

## Leadership Influences

ABHOW supervisors and colleagues are my mentors—they provide inspiration to me and are honest in their feedback as they observe my leadership abilities. I have the opportunity to share best practices, solve challenging issues and learn from an amazing team. My community staff, residents and their family members provide me with ongoing insight and support. These mentors have helped develop a deeper insight of my leadership style and philosophy, allowing me to become a more effective leader.

## Turning Points

Inspiring a large number of staff members to a higher vision for our services has been a turning point in my learning to be a better leader. Person-centered care standards require flexibility in job descriptions, attitudes, daily practices and behavior change. Quantifying such flexibility in a manner that conforms to the requirements of our union contract has been a challenge. Negotiating with union leadership and communicating change to employees who have grown accustomed to the rigidity of job duties have required a great deal of learning on everyone's part.

## Moving Forward

I have successfully restructured the management team at Grand Lake Gardens in alignment with person-centered care standards. Services to residents, including wellness and dining, have been enhanced. I have completed the renovation and remodeling of many public areas creating a computer lab, a new gym, a billiards room, a theater and a resident social hall. The next phase requires ongoing training of all stakeholders. Services in residential living apartments are being evaluated and increased, thus minimizing the need for a transfer to assisted living or skilled nursing.

## Key Learning

Leadership AAHSA has transformed my vision of leadership, refocusing me on a path of lifelong learning to enhance my leadership abilities. The amazing design team and coaches created an environment that was a catalyst for personal and professional growth. I have been inspired by and learned from other Fellows, especially my teammates. I have learned the power of a well-framed question, the importance of ongoing self-reflection and the need for emotional intelligence and transformational leadership. A tremendous network of talented colleagues and friendships with other Fellows are gifts that have and will continue to enrich my life.



# Jacoby



**Kristen Jacoby**

Executive Director

Bethesda Adult Communities

Ft. Collins, CO

## The Summit—The View from Here Is Amazing!

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Kristen began her career in aging services in 1993, working as a certified nursing assistant. She pursued a bachelor's degree in gerontology from the University of Northern Colorado in 2000. She later obtained an MBA from Colorado Christian University in 2005. Kristen has worked for Bethesda Adult Communities since 2000, beginning as the marketing director and now as executive director. She has been married to her husband Mark for five years, and they have a three-year-old son named Luke.



## Innovation, Person-Centeredness and Transformational Leadership

I was drawn to my project by the value that was added to people's lives when programs focus on the person. My project will take the traditional medical model and transform it to focus on individuals and what they can offer to our community, thus meeting Leadership AAHSA's transformational tenet. *The Summit* will include resident participation in all aspects of operation, including policy and program development, employee interviews and selection. We also will offer flexible and varied activities, dining programs and care delivery systems designed to meet the Leadership AAHSA tenets of innovation and person-centeredness.

## Leadership Influences

The relationships I have developed as part of the project have not only increased my self-confidence but also brought to the forefront new beliefs. I have found that we are not the only decision makers and, in fact, those around us often have the answers we need, but are overlooked. By building relationships, we are establishing trust, and when people trust you, they are willing to give every skill and talent they have to the betterment of the organization.

## Turning Points

A turning point for me has been the discovery of reflection and personal time. Leaders cannot effectively lead if they cannot take time to learn from every experience, take time for themselves and set boundaries accordingly. Once the program was outlined to all of my staff and they were asked to participate in getting to our vision, they took ownership and ran with the program. Two of our sister communities have begun their culture change journey. Since beginning the change, we have seen residents and staff flourish, friendships increase and residents' frailty decrease.

## Moving Forward

As the future unfolds, my hope is that all programs and services add value and establish community relationships. Another hope is that communities will see the benefit of adding individualized and flexible programs and that we can become a model for our organization and the community at large. I foresee that many of our programs will be developed and designed by the people who call Bethesda Adult Communities home. I would like to develop an employee enrichment program that empowers and adds value to their lives and creates fulfillment and unity.

## Key Learning

The site visits at all of the locations broadened my point of view. We have seen how the field of aging can add value and develop skills and abilities of all people involved—most of all, the residents. In addition, I have seen that there are vast differences in the services that are needed today compared to what will be needed in the future. Seeing what will be needed in the future has influenced me to begin preparing now.



**Michelle Just**

Director of Fund Development  
Beatitudes Campus  
Phoenix, AZ

# Just

## **Integrating Holistic Wellness Across the Continuum and Beyond**

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Michelle began working with the Beatitudes Campus in 2000 as the resident development manager, responsible for the marketing and leasing of the independent and assisted living units. In 2004, she was promoted to director of fund development. She recently completed the campus' first capital campaign, a \$5 million fundraising initiative for a campus redevelopment project. From 1997-2000, Michelle worked for Integrated Health Services of Cherry Creek in Denver, CO, as admissions manager and associate director of social services. Michelle graduated from Metropolitan State College of Denver with a degree in health care administration.

## **Innovation, Person-Centeredness and Transformational Leadership**

This project gave me the opportunity to grow both professionally and personally by stepping outside of my normal roles of fundraising and public relations and delving deeper into the operations of the campus. Whole-person wellness is no longer just a concept in our field, but a way of life for seniors of today and tomorrow. Creating a holistic wellness program—utilizing the seven dimensions of wellness—affords those we serve the opportunity to continue to live fully, learn exponentially and grow unconditionally. This is at the heart of person-centered care and is culturally innovative and transformative.

## **Leadership Influences**

My mentor and CEO, Peggy Mullan, has played a key role in my leadership development. She has kept me grounded and encouraged me to keep an eye on the overall vision while moving the interdisciplinary team forward. She challenges me to look outside the box and has helped me strengthen my skills in articulating a vision to which others can relate. This has been beneficial when leading my peers through the planning process. Most importantly, I've developed the ability to adjust my leadership style as needed throughout the process to ensure that the design team stays focused on the final outcome.

## **Turning Point**

The turning point was when I realized the project had become bigger than we could manage. It was uncomfortable for us as a group to pare back our concept to manageable, bare essentials. We solved that dilemma by creating a phased implementation over 24 months. This seemed counterproductive, but we came to realize that the quality of the project in the end is more important than how quickly we bring the project to fruition. A continuing challenge we face is the classic balance between mission and margin—that is, incorporating all the elements of holistic wellness within a finite budget.

## **Moving Forward**

The first phase of the program is slated to begin in the fall of 2008, with subsequent phases rolling out every six to 12 months, eventually expanding to family members, employees and the broader senior community. As it moves from vision to reality, we will have the opportunity to continually re-evaluate the success of the program and adapt accordingly. Through the implementation of new ideas and ongoing research of best practices in our field, we can create a comprehensive model, unique to our campus and community needs. The design process we develop will be replicable and thereby benefit the broader aging services profession.

## **Key Learning**

I have been blessed to learn from a talented faculty who taught me the power of “emotional intelligence” and “leading with questions.” This is proving incredibly beneficial during my action learning work. Much was also gleaned from the site visits and interactions with Leaders in Residence. Most significantly, I have been humbled and inspired by the insights and advice I received from my teammates and other Fellows. I have made lifelong friends and created a network of colleagues to turn to in the future. It is encouraging to know that the field I have so much passion for is in good hands.



**David Karlin**

Chief Executive Officer

St. John's, Inc.

Hays, KS

## Leadership Development: The Beginning of a Lifelong Journey

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Following a mostly normal childhood in rural Kansas, David joined the U.S. Navy. While completing a bachelor's degree in geology at Fort Hays State University, he served in the Army National Guard. Often asked, "What does your degree in geology have to do with your work in nursing homes?" he responds with a sense of humor that has allowed him to thrive as a nursing home administrator, executive director and now as a CEO: "Well, I have spent a lot of time studying fossils!" He has ably served four quality organizations in senior care since 1998.

## Innovation, Person-Centeredness and Transformational Leadership

The responsibility of leadership development in others is one of the primary responsibilities of genuine leadership. I was specifically drawn to helping others begin their own leadership journey due to the overwhelming need for leaders in our field and in honor of an incredible leader who took upon himself the role of mentor and gave me the push I needed to begin my own leadership journey. That man, Phil Elmore, currently serves as CEO of Christian Care Centers, Inc., in Mesquite, TX. My hope is to create in others the desire to serve and lead through vision and innovation.

## Leadership Influences

The relationship I have with one specific mentor has come in the form of a friend, peer and direct supervisor. His impact on my leadership journey and career has been so substantial that I chose to honor him in my action learning project by focusing on helping others along in their own journey. Even though I recently chose to change employers and am geographically separated from him, I rest comfortably knowing he is a telephone call away. Leadership is a journey best taken with someone you trust.

## Turning Points

There was a change in my position and the organization I served during the year I participated in Leadership AAHSA. This transition directly impacted who the actual partners and stakeholders were in my action learning project. My project had to evolve, as well. Most notable was the level of employee who I desired to personally mentor. The level of leadership skills in those serving in management positions in the new organization forced me to focus more of my effort on those with a “title” than those without, as I had initially intended.

## Moving Forward

There are two outcomes that I hope are achieved with my project. First, my original intent was to create a leadership development program that was both effective and replicable. Secondly, I truly desire to spark a passion in those around me, which drives them to constantly focus on developing themselves as leaders and that they, in turn, look for opportunities to mentor others on their leadership journeys—“Pay It Forward” Leadership.

## Key Learning

The Leadership AAHSA program really impressed upon me the correlation between quality leadership and quality organizations or programs. Behind each amazing site visit was a high-quality leader, and many times a group of leaders, who had nurtured the organization’s culture into something very special. Conversations with those leaders continually reaffirmed in me the belief that leadership matters! This simple phrase was a consistent thought and pillar that I reflected on when developing my project, which focused on a leadership development program.





**Christianne Kovel**

Senior Director, Public Policy and Communications  
Alzheimer's Association, Connecticut Chapter  
Kensington, CT

# Kovel

## Using Our Collective Voices: Communicating the Message About Alzheimer's Disease

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Christy has 17 years of experience in senior health care. In her current role, she is responsible for the execution of the chapter's public policy initiatives, which includes training new advocates and serving as a communicator lobbyist to the Connecticut General Assembly. Additionally, Christy implements the organization's communication plan, serving as a spokesperson at events throughout the state. Christy is a member of the Connecticut Long-Term Care Advisory Council and is on the Advocacy Council for the National Alzheimer's Association. She is an adjunct faculty member in the Human Development/Gerontology Department at Saint Joseph College.

## **Innovation, Person-Centeredness and Transformational Leadership**

An estimated 10 million baby boomers will develop Alzheimer's disease. These numbers will have a dramatic impact on our health care delivery system, and I wanted to use transformational leadership to work with AAHSA members in telling the story to policymakers and the media. My project also has the tenets of person-centeredness, as I have involved family members who have loved ones with the disease, and innovation in communicating the events that family members have held to raise awareness in their communities.

## **Leadership Influences**

I have been fortunate to develop partnerships throughout the state to shape the direction of my project. With a growing need for increased attention to Alzheimer's disease, it is the collective voices of many that will gain the attention of policymakers and the media to raise awareness.

## **Turning Points**

The ongoing challenge is to maintain the energy and motivation needed to keep communications and messaging consistent. Competing priorities for resources and time have an impact on the decisions of policymakers, and my insight on this project is that this will continue for the next several years.

## **Moving Forward**

I see this project becoming more diverse as the months unfold. My hope is to make additional connections with provider organizations to "tell the story" of Alzheimer's disease. I also hope to work with area schools to find students who are impacted by the disease of a loved one. The creativity of students that I have worked with this year have provided much inspiration.

## **Key Learning**

I learned early in the program that I will encounter some crucible moments in this project, and that has helped me establish realistic goals and timeframes for action. The Leaders in Residence conversations throughout our year together reinforced focusing on process as the means to achieve success, and this has been a valuable lesson.





## **Christy Whitehead Kramer**

Administrator

Asbury Methodist Village/Asbury Communities

Gaithersburg, MD

## **Culture Change: A Vehicle to Fly Above the Competition**

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Christy is administrator for the Wilson Health Care Center at Asbury Methodist Village. She began her senior living career through an administrator-in-training program supported by Asbury Communities. Prior to her involvement in senior living, Christy was involved in design and construction. She worked for Bear Stearns as a project manager on the completion of a 46-story skyscraper in midtown Manhattan. Upon the completion of this project, Christy decided to pursue her interest in the design and management of senior living communities. She obtained a master's degree in health services administration with a concentration in long-term care administration from George Washington University. Christy currently resides in Washington, DC, with her husband.

## **Innovation, Person-Centeredness and Transformational Leadership**

Asbury Methodist Village is within a highly competitive market where the competition is striving to outdo itself with products like concierge suites and “luxurious accommodations.” Asbury consistently maintains its market share with quality and innovation. Its aging building has not permitted lavish upgrades. Despite its excellent reputation, the competition has encroached, and the need to sustain market share is critical. Person-centered care and innovation—rather than physical upgrades—are the keys to fly above the competition. Implementing a “neighborhood” within traditional walls will transform Asbury and demonstrate that luxury alone cannot compete with innovation and quality.

## **Leadership Influences**

My mentors have consistently encouraged and contributed to the development of this project. Although the direction of my project has not changed course, my perspective on the direction has been challenged and altered throughout our conversations. The internal partners, challenged with implementing this project, have supported the vision while making it a realistic project to execute. Both the mentors and partners have proven that a strong vision, communicated well, can set a course. A shared vision is even more powerful than a strong vision and can impact the lives of residents and associates.

## **Turning Points**

Throughout the planning of this project, there have been setbacks. Clearly establishing the baseline knowledge of key leaders revealed a lack of understanding to fully embrace and implement the project. Therefore, additional time and energy was needed to educate key leaders and obtain commitment. In addition, financially, even small physical changes could not be made to the space. The real challenge has been pushing ahead with the project despite the setbacks and maintaining momentum.

## **Moving Forward**

I foresee that the project will take off this fall and early winter. The foundation for the project has been laid this spring and summer. This fall, a team of enthusiastic associates will be learning more about the project and tackling the implementation. By January, with the assistance of a culture change consultant, the project will be in full speed, and the impact on residents will begin to be realized.

## **Key Learning**

Interactions with Leaders in Residence and site visits have not only given me the courage to push forward but the hope that all of the work and struggle will make an impact on the daily lives of our residents and associates and, one day, the field. The leaders were inspirational, and the site visits demonstrated that it could be done and succeed. The action learning process has given me an opportunity to share a project with the Leadership AAHSA Fellows, which has been invaluable. Receiving their feedback based not only on their prior experiences but their knowledge from Leadership AAHSA has been rewarding for both myself and the Fellows.



**Lynette Ladenburg**

Chief Financial Officer

Tacoma Lutheran Retirement Community

Tacoma, WA

## Aging Services of Washington State Leadership Program

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Lynette has served as chief financial officer of Tacoma Lutheran Retirement Community (TLRC) for over 10 years and, in September 2008, will be promoted to chief operating officer. Lynette is a graduate of the University of Puget Sound in business administration and accounting, became a licensed nursing home administrator in 2008, graduated from the Faith-Based Leadership Institute in 2007 and became a Certified Aging Services Professional (CASP) in 2006. Currently, she's a board member of Aging Services of Washington and chair of the Technology Committee. Lynette has three beautiful children and enjoys quilting, reading and running in her spare time.

# Ladenburg

## Innovation, Person-Centeredness and Transformational Leadership

Commitment to Washington state, aging services and individuals who work within our profession is what inspired me to partner with our state association and other leaders in developing a leadership program. Within this commitment, there is a deep connection to the core tenets of Leadership AAHSA. Bringing a national program to one's state and developing the leaders of tomorrow is innovative, transformational and, most of all, at the core of person-centeredness. I see workforce development and focus on consumer choice as two of the goals within the project and Aging Services of Washington that align with the Leadership AAHSA core tenets.

## Leadership Influences

Success is developed with the partnerships we form and the teamwork that is established. I have had the good fortune to have two mentors and a number of excellent leaders in this profession to help guide me. Deb Murphy, CEO of Aging Services of Washington, and Paul Opgrande, President & CEO of TLRC, have been outstanding in their encouragement, influence and styles of leadership. They, and my relationships with various leaders and peers established through Leadership AAHSA and this action learning process, have influenced my energy and enthusiasm to be an authentic leader.

## Turning Points

We are often reminded in the field that change is constant and being flexible is a key aspect of leadership as we move into the future. Having charted a course in one direction, I was later surprised by the passion and collaboration of others, which challenged me to expand my view to suit needs and current trends and to anticipate the unexpected. I learned to be flexible and to evaluate the project from all angles, which allowed me to entertain more options for a successful endeavor.

## Moving Forward

The first class of the year-long Washington State Leadership program is scheduled to start in June 2009 at the annual conference in Spokane, WA. It is my hope that the program continues on a yearly basis to develop many qualified individuals in the field and become yet another advantage for the membership of Aging Services of Washington. Developing not only middle management in Washington state, but also engaging all individuals within our profession on leadership development, is my vision for this program.

## Key Learning

What an incredible journey Leadership AAHSA and the action learning project have been. Thank you to the wonderful people who welcomed us to their campuses, to the Leaders in Residence who shared their time and to the incredible faculty and staff for their excellent choice in readings. They each taught us that there are many forms of leadership and ways of providing loving care and compassion to the individuals we serve. I leave with increased knowledge and dedication to the field of aging services and, most of all, with a renewed confidence to the further development of my leadership for the future.





**Laurie Mante**

Vice President/Administrator  
Northeast Health/The Eddy  
Cohoes, NY

## Using Self-Managed Work Teams to Improve Outcomes and Staff Satisfaction in Long-Term Care Settings

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Laurie is a vice president with Northeast Health/The Eddy in upstate New York.

Currently, she serves as project manager for The Eddy's Green House® project, slated to open in fall 2008. Previously, she has served as a nursing home administrator and coordinator of residential services for The Eddy. Laurie lives in Latham, NY, with her husband Tom and daughters Emily and MaryKate.



## **Innovation, Person-Centeredness and Transformational Leadership**

Self-managed work teams are an integral component of the Green House® (GH) model. While not every facility can transform its physical plant, I think components of the philosophy can have a positive impact in traditional long-term care settings. Current GH projects have seen dramatic reductions in turnover. I want to test whether these outcomes can be replicated in non-Green House® settings. Self-managed teams touch on all of the Leadership AAHSA core ideas—transformational leadership needed for the development and guidance of teams, person-centered care when the teams function with residents and innovation by changing how we work.

## **Leadership Influences**

This project is still in its infancy. Our first Green House®-based teams will not be formed until October 2008. The lessons learned as a guide for these first teams will be applied to evaluate the possibility of expanding the teams to other settings at The Eddy. We are a learning organization that embraces change, so my idea has been met with interest, curiosity and an openness to experimentation.

## **Turning Points**

As I have begun to work on this project, I have been surprised at the positive response of my colleagues. One of the challenges will be identifying how we will measure the “success” of the self-managed team concept. While staff turnover is one of the obvious measures, staff satisfaction and enhanced resident outcomes will be a little more difficult to measure. A turning point for me was some of the literature that documents how little control many staff members feel they have over their work environments and that fixing this can really lead to an engaged staff and better outcomes.

## **Moving Forward**

I hope the accomplishments of the first self-managed teams will create enthusiasm throughout the organization. As we begin to articulate the outcomes from the teams, I believe other affiliates within The Eddy will be willing to try this model. I hope to see replication of the team concept in spring 2009.

## **Key Learning**

The Leadership AAHSA experience has taught me to be open to experimenting and to trying new ways of doing things. At many of our site visits, we saw organizations that were “jumping in” to try new ways—sometimes very successfully, sometimes not. However, we will never improve quality for our residents and staff if we don’t try new models. I also have been inspired by staff and their ability to achieve great things when we create the right environment for their success.



**Linell Nevius**

Director of Human Resources

Mary's Woods

Lake Oswego, OR

# Nevius

## Identifying and Developing The Hidden Leaders Within an Organization

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Linell has worked in business management and executive level human resources for 15 years. Her first career was as an RN for Group Health Hospitals in Seattle. She believes that one of the exciting things about her position with Mary's Woods is that it incorporates the human resources functions of organizational development, recruiting, motivating and retaining top employees with the opportunity to develop training programs to support active growth and involvement in the health care field. Linell has been director of human resources at Mary's Woods since 2004.

## Innovation, Person-Centeredness and Transformational Leadership

Too often, a promotion from line staff to management is undermined by insufficient support and training. Everywhere, there are personnel who are ready to grow professionally but are unrecognized within an organization. I wanted to find a way to improve how we identify and support these potential leaders more successfully. My project involves directors and supervisors in identifying potential future leaders within their departments and investing in their role toward supporting those individuals. Additionally, it involves creating a training program involving all departments, focused on confidence, skills and camaraderie and involving precepts of “Transformational,” “Level Five” and “Servant” leadership.

## Leadership Influences

At first, my concept was more task-oriented and focused on ways to be exciting to fledgling and/or unsupported leaders. After my third session with this leadership program, I began to recognize how stimulating it is to be part of a discovery group, and my concept expanded. I want less direct teaching and more engaging, experimental, connective growth opportunities for this training program. The relationships I found in this program are ones I want to keep and build upon, and I think some of the same lessons can be brought to these trainings for future potential leaders.

## Turning Points

One turning point was a simultaneous surprise, setback and challenge, which resulted in the following insight. As my project developed and I sat up nights making notes about how good it was going to be, Mary’s Woods was experiencing great stress. My mentor left, and budgetary considerations meant that I might not continue in the program. At one point, I thought this training program wouldn’t come about. Then I realized that I had everything I needed to make this project happen. The training, books, insights, the support from this leadership and my Fellows and my own initiative were enough.

## Moving Forward

I hope to work collaboratively with my new mentor, Michele Holleran, to refine and replicate this model for our field and beyond. I want this training to include people across generational lines to better understand and respond to issues that motivate employees in their teens and employees in their 70s. I want it to help break up departmental silos, supporting collaboration within companies. I want graduates from this training to come away knowing they have a cohort of colleagues they can lean on and the confidence and inspiration to approach challenges in life and the workplace with greater success.

## Key Learning

Leadership AAHSA substantially expanded my approach to leadership and gave me the tools to understand how to build my own skills in a richer, more nuanced and authentic way. The action learning process puts that into practice and helps me to be patient. There was a time when if assigned such a project, I would have plunged in and defined, developed and carried it out within a month. By waiting to let some of our learning processes unfold, it will become a richer, evolving and more valuable training for our employees.





## **Brandy Page**

Director of Wellness and Development  
Seabury/Church Home of Hartford, Inc.  
Bloomfield, CT

## **Seabury: Active Aging @ Home**

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Brandy joined Seabury in May 2004 and has a bachelor's degree in exercise science and health promotion. She is nationally certified as an advanced personal trainer through the Aerobics and Fitness Association of America and serves as a member of the International Council on Active Aging and the American Society on Aging Business Forum on Aging. She is working on her master's degree in long-term care, senior housing and aging services from the University of North Texas. Brandy has international experience as a lifestyle coach and resides nearby with her partner Joseph and their new baby girl Sophia Rae.

## **Innovation, Person-Centeredness and Transformational Leadership**

Active Aging @ Home is the prescription to halt and even reverse the effects of aging. It engages individuals to participate in a healthy lifestyle to reduce health care costs and extend quality of life. This program involves personal home visits by a fitness and wellness specialist to develop an action plan to maintain independence. It is person-centered because the action plan is based on the assessed needs and goals of an individual. It is transformational because it focuses on the preventative health care versus medical model of care. It is innovative because evidence-based results through the latest in research and technology are used to reduce physical and cognitive decline as we age.

## **Leadership Influences**

My sponsor, John Mobley, President & CEO of Seabury, has played a key role in guiding me through this leadership journey. His ability to formulate and share his visions with the quest to keep up with the latest in technology has turned dreams into reality. My mentor, Margie Sullivan, vice president of health services, has given me the chance to grow as a leader and has taught me how timing can be everything. Their desire to support and foster my leadership skills has made me want to give the same opportunities to other upcoming leaders.

## **Turning Points**

While interacting with the Leadership AAHSA faculty, coaches and other Fellows, I came upon a crucible moment. It was that I was making this project more complicated than it needed to be. It made me realize that when people are in their field of expertise, they tend to want to perfect a project before it is even implemented, which can prevent an idea from even getting started. This experience taught me to establish the basic fundamentals, stay flexible and grow with a concept, which will produce a more realistic and successful endeavor.

## **Moving Forward**

I foresee Active Aging @ Home being brought into homes of the greater Hartford area. Local universities, researchers, medical practitioners, senior centers and fitness centers will be invited to collaborate on this project. This will create a healthier and more active senior population who will be able to enjoy a successful and positive aging experience. My aspiration is to see Active Aging @ Home as an affordable model that others can follow. It will break the stereotype that growing older means becoming frail and allow us to be more involved in managing chronic conditions while helping seniors stay active and independent.

## **Key Learning**

The remarkable site visits gave me a profound insight into the readings and leadership theories that were discussed throughout the year. Another significant element of the Leadership AAHSA program was the interactions we had with the Leaders in Residence. Meeting these reputable leaders and discussing with them their experiences in the field were invaluable. Some of the priceless notions that came out of these connections were that leaders don't need to have all the answers and that asking the right questions and listening without pre-judgment can produce an open environment in which creative thinking can explore outside the box.



**Sheri Peifer**

Vice President, Research and Strategic Planning  
Eskaton  
Carmichael, CA

## Eskaton National Demonstration Home

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Sheri joined Eskaton in 2005. She spearheads unique collaborations with research universities, technology and home building partners aimed at enhancing the services and housing options within Eskaton. Researching and implementing health technologies and new models of service delivery and care are main initiatives in this role, as is exploring new business opportunities for Eskaton in the future. Sheri serves on the commission for the Center for Aging Services Technologies and on the planning committee for Aging Services of California. She holds a master's degree in gerontology and education from California State University, Sacramento, and a bachelor's degree in family studies from Messiah College in Grantham, PA.

## Innovation, Person-Centeredness and Transformational Leadership

The Eskaton National Demonstration Home will educate the building industry, consumers, policymakers and others of the advances in innovative home design, green living and supportive technologies promoting health and well-being for older adults. The project is transformative in that user-friendly design and comprehensive infrastructure planning will create homes that are built to flex as one's needs change. It is innovative because the homes will feature integrated technologies that support the health, wellness and social connection of older adults, along with an education station. It is person-centered in that it focuses on solutions to the complex and changing needs of older adults and the caregiving network that supports them in their homes and communities.

## Leadership Influences

The demonstration home is the result of our board of directors' vision, plus numerous collaborative relationships with technology, housing and academic leaders interested in creating environments where seniors feel empowered, socially engaged and connected to their support systems. The direction of the project continues to focus on creating coordinated solutions and interoperability to support seniors in the environment of their choice. It has been interesting as a leader to learn how diverse partners can work together toward a collective goal, affording the opportunity to examine new ways of providing service and communication.

## Turning Points

There have been many challenges, setbacks and insights during this project. I believe anything worthwhile will be difficult as roadblocks and miscommunication set in. Actively engaging peers in the project and coordinating interactive meetings among collaborating partners were essential in making this project a success. One of the most challenging aspects was to refine the messaging elements to communicate the project's purpose to multiple audiences in a simple, refined manner. I realized how verbose I can get! The greatest benefit was having honest feedback from my mentors and coaches.

## Moving Forward

As the Eskaton National Demonstration Home opens to the general public this fall, our hope is to advance the awareness and education of innovative home design, green living and supportive health and wellness technologies for older adults. The home will then be transformed into a living laboratory in late spring 2009, with selected older adults living in the home, interacting with the technology and living life! A video documentary series will capture the experience of those living in the home, family members and health care providers to further understand the establishment of networks of care.

## Key Learning

The experiences of Leadership AAHSA have coalesced from the beginning with understanding how crucible moments shape our life story and help refine our ability to adapt and be nimble in various situations, to learning through site visits about culture change and the courageous process of transformation and empowerment for residents and staff. These experiences, along with powerful emotional intelligence leadership insights by Goleman in *Primal Leadership*, have shaped my approach toward engaging others around my action learning process. It is through casting the vision and engaging others that this project will be successful and live on!





**Jason Pincus**

Assistant Director of Senior Housing  
Miami Jewish Home and Hospital  
Miami, FL

# Pincus

## **Douglas Gardens North: An Innovative New 30-Acre Senior Campus in Partnership with the State of Florida, the City of Pembroke Pines and the Miami Jewish Home and Hospital**

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After graduating from the University of South Florida with a degree in gerontology and business management, Jason received his nursing home administrator license while working for the Miami Jewish Home and Hospital (MJHH). He has been with the organization for 11 years and serves as assistant director of the senior housing division. He received his MBA with a specialization in health care administration in 2003. Jason currently sits on the executive board of the Florida Association and Homes and Services for the Aging as housing chair and volunteers with other local agencies. He is a graduate of AAHSA's CASP program.

## **Innovation, Person-Centeredness and Transformational Leadership**

Creating a prototype senior campus in the state of Florida gives me the opportunity to establish innovative programs and incorporate person-centeredness and transformational leadership into the overall operations of the new campus. I am ecstatic knowing MJHH will incorporate new ideas and programs, avoiding the traditional institutional medical model. I know this campus will be a prototype for the state of Florida and the nation. By visiting many different organizations and facilities, I have had the opportunity to speak to leaders in our field and discuss programs that have worked in their organizations.

## **Leadership Influences**

My mentor, Litha Berger, has given me the opportunity to work closely with architects, contractors, city and state officials and board members. I have learned to be a contributing professional leading my team by providing guidance and empowering them to grow professionally in the aging services field. As a board member of the Florida Association of Homes and Services for the Aging, I serve on various committees with CEOs, CFOs and other aging service professionals and have been enriched with their sharing experiences and demonstrated professionalism.

## **Turning Points**

The original concept for the past 18 years has been to build independent, assisted living and special care units with affordable housing as the final phase. The challenge has been funding such a large project without committing MJHH to obligate the foundation for a large sum of money. The setback has been many years of committee meetings, design phases and funding strategies with no solution. The turning point for me was when MJHH was awarded two HUD Section 202 low-income affordable housing grants in the amount of \$15 million, which enabled us to move this project to Phase 1 and begin development of the campus.

## **Moving Forward**

Douglas Gardens North is in the design development stage of 130 independent living units with an anticipated ground breaking in spring 2009. The campus will consist of approximately 500 units of independent living, assisted living and special care for people with chronic illnesses. The staff training will emphasize the philosophical principles of person-centered care. Many of the innovative programs of MJHH will be incorporated into Douglas Gardens North. Child daycare, adult day care, a petting zoo and an affiliation with local grade schools and universities will be vital to our approach to making this an innovative campus.

## **Key Learning**

Leadership AAHSA has expanded my vision, understanding and drive for excellence in my leadership skills. I have witnessed positive interaction between leaders and their staff and also seen the negative impact of poor leadership. Interaction with other Leadership AAHSA Fellows provided the greatest learning experience by exchanging views, ideas and thoughts. After site visits, the group would meet and discuss what we observed, which permitted me to hear different points of view. At times, my initial observation was changed after group discussions, which proved an invaluable learning experience and will help me be an effective leader.



**Laurie Posner**

Medical Director  
Jewish Home Lifecare  
Bronx, NY

## The Palliative Care Teaching Project

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Laurie is a physician who was born, raised and educated in New York City. She came to Jewish Home and Hospital nearly eight years ago from private practice and is now medical director of the Bronx division. As an undergraduate, she studied anthropology at Barnard College and is a graduate of the Mount Sinai School of Medicine. She did her internship, residency and chief residency in internal medicine at Montefiore Medical Center and went on to do a fellowship in nephrology at the Albert Einstein College of Medicine. In 2005, she received board certification in hospice and palliative medicine.

# Posner

## Innovation, Person-Centeredness and Transformational Leadership

There is a critical need in long-term care to provide palliative care (PC) to residents who are nearing the end of their lives. Using the “community” as a teaching tool, Jewish Home clinical staff will be educated in nine core PC competencies. Our culture change initiative at Jewish Home Lifecare has created a fertile environment for this kind of program. It is transformational, innovative and person-centered because our mission is to move away from the medical model, upon which resident care in long-term care institutions has historically been based, to one that honors the integrity and uniqueness of the individual.

## Leadership Influences

The relationships that have grown out of my Leadership AAHSA experience occupy a pivotal place in my leadership experience. They have provided a “safe haven” as I’ve negotiated a new language and professional terrain. Disappointed by a setback early on after the first incarnation of my project derailed, my working group helped me regain focus and get to a place where I was able to appreciate the notion of “process.” This allowed me to change the project’s trajectory without losing site of the core values that were its guiding inspiration.

## Turning Points

I had been working with my staff on overcoming obstacles in obtaining advance directives, encouraging them to have the hard conversations about end-of-life issues, to respect an individual’s values and to help residents and their families think about and plan for the future. After praising the work of one of the doctors, who for cultural reasons had never had an easy time dealing with end-of-life issues, she pulled me aside and said that she had “found the process enormously difficult.” Her comment stopped me in my tracks and renewed my respect for the power of belief.

## Moving Forward

I would like to see this project result in an enhanced quality of life, as life nears its end, for our residents and their families through effective pain management and relief of physical and spiritual suffering, by involving them in decision-making processes and by providing avenues for spiritual and psychosocial expression in the setting of chronic and progressive disease. I also hope that the educational experience, when translated and put into practice at the bedside, will enrich the work experience for our staff and make their relationships with our residents that much more meaningful.

## Key Learning

The Leadership AAHSA experience introduced me to new ideas and “ways of seeing” that were outside my frame of reference. The coaching, didactic training, readings (and poetry), Judy and Michele and the relationships have “changed” me in a deep way. I am more self-aware and mindful of my role in what Heifetz calls “the adaptive process.” All of this has informed my action learning, which has been an arena where I have been able to put much of the Leadership AAHSA “theory” into practice. This, in turn, has had an enriching effect on the instructive piece of the experience.





**Michael Rambarose**

Vice President  
Whitney Center, Inc.  
Hamden, CT

## Transforming the Type “A” Life Care CCRC for Long-Term Viability

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After eight years in the military, Michael moved back home to the mid Hudson Valley region where he accepted a “temporary” position in a community outreach program for an aging services provider. Ten years later, Michael finds himself still growing more and more intrigued with the field, specifically, the challenges we face with the imminent boomer-driven surge in demand for senior health, housing and related services. Michael holds a bachelor’s degree from Embry-Riddle Aeronautical University and an MBA from Pace University. Michael and his wife Anita continue to live in Orange County, NY, with their sons, Mason, 11, Austin, 9, Ashton, 3, and Michael, 1.

## Innovation, Person-Centeredness and Transformational Leadership

As multi-service level campuses gain in popularity, the traditional type “A” life care CCRC is waning in proportion to modified, fee-for-service and rental properties. This high-risk, complex product targeting upper and upper-middle income seniors is losing appeal to providers. However, I believe that life care CCRCs offer the best price/service combination over the long-term. Providers remaining in this niche must force significant business model transformation to ensure viability. We must innovate, possibly integrate unlikely product types and reposition to penetrate the middle-income market. This product convergence concept may be the key to the sustainability of life care CCRCs.

## Leadership Influences

I am growing more aware of the interdependent nature of the relationships that I’ve formed over time with mentors, board members, colleagues, staff and customers. I have begun to appreciate that every relationship is bi-directional—I have as much to learn and benefit from others as they do from me, regardless of relative organizational position. This realization is humbling, as well as liberating. I’m more comfortable not having all the answers, and I’m less inhibited in seeking input from unlikely sources. I’m becoming more fully aware of what is meant by the saying, “None of us are as smart as all of us.”

## Turning Points

I had difficulty with the action learning project scope—it was too far-reaching and didn’t have the direct applicability to my organization in order to make it practical. As a result, I was unable to sufficiently frame my ideas and develop the project. I even considered “fall back” projects. After speaking with and getting advice from several people, specifically my Leadership AAHSA coach, I was encouraged to pursue that for which I had passion and not settle for something that might be unfulfilling in the long run. This was sage advice, not only for the action learning process, but for leadership in general.



## Moving Forward

Once sufficient product research is conducted, hypothetical business model development will occur. I will then present the concept to our Long Range Planning Task Force to bring to the full board of directors for approval and funding to fully develop as part of a larger strategic plan. We will then undertake significant market research and actuarial analysis, along with pro forma budgeting. Given current and near-term initiatives, I envision a repositioning launch in about five years. It is my hope that this idea works well enough to serve as a model for the rest of the aging services field.

## Key Learning

The collective Leadership AAHSA experience has had a profound impact on my perspective as a leader. Being technically savvy and leading through an “expert” style is not enough or always appropriate. I’m developing an understanding that to be an effective leader, I must become more engaged or affiliative and less directive. I’m becoming more self-aware. As such, I’ve learned that knowing and preserving my core values will always be the key to my effectiveness as a leader. Finally, I’m most appreciative of the relationship-building that Leadership AAHSA inspires. This undoubtedly will be the most sustaining aspect of the program.



**Aimee Reimann**

Executive Director

Abernethy Laurels/United Church Homes and Services  
Newton, NC

# Reimann

## **Building Collaboration: A True Team Approach to Change**

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Aimee is executive director of Abernethy Laurels, a United Church Homes and Services CCRC. She previously served as a nursing home administrator for Lutheran Services for the Aging and has been a licensed nursing home administrator since 2004. After graduating from Indiana University of Pennsylvania with a bachelor's degree in dietetics, she began her career in aging services as a director of food services. She has over 10 years of experience in various aspects of health care management. Outside of Abernethy Laurels, Aimee enjoys life with her husband Jared and daughter Kate in Statesville, NC.

## Innovation, Person-Centeredness and Transformational Leadership

I was drawn to my project following my exposure to a collaborative leadership approach in a former organization. This experience helped me understand the importance of collaborating as a group to solve agreed-upon issues. This dynamic approach to leadership is transformational because it is a paradigm shift from “traditional management”—one in which more decisions are made by line-level staff. It also builds trust between staff and “management.” It is person-centered because it focuses on input from all staff that will help guide strategic planning, policy development, programming and the general culture of the campus.

## Leadership Influences

My relationship with my Leadership AAHSA coach influenced my action learning because she helped lead me to something I am passionate about. I have been afforded the opportunity to build relationships with other Fellows that will last a lifetime. These relationships have not only helped me become a stronger leader, but have helped me become a better person. Through this experience, I have met what I consider to be some of the best leaders in our field. Identifying what qualities they possess has helped me identify which leadership qualities I would like to strengthen in myself.

## Turning Points

A turning point during this process occurred when my project was changed mid-stream. During this process, I realized that to be transformational, all team members had to hold a shared vision for the campus. I could not think of a better way to lead into the future and implement all the things that the future may hold than by involving all team members in the decision making and vision planning. One challenge that I have faced is that some staff may not want to be involved in decision making, and that is okay.

## Moving Forward

I hope to make employees understand that not only are they our most important assets, but they are an integral part of the overall plan. This approach to leadership will not only make staff feel more ownership within the organization, but will lead to great opportunities and new directions for the campus. I also hope it will help create an environment that is more participatory between residents and staff. Ultimately, happy and empowered employees will translate into more satisfied residents.

## Key Learning

Leadership AAHSA has been an unbelievable and rich learning experience—truly a unique opportunity that has been life changing! Specifically, there were leaders that I met throughout the year who are not only inspiring, but aid me in thinking bigger. My action learning project has forced me to self-reflect and understand myself, so I am better able to help those I serve. It has brought to the forefront of my mind that by strengthening relationships in all aspects of our lives and by maintaining balance, we are better able to help shape the future of aging services.





**William Snyder**

Vice President, System Leadership and Collaboration  
Lutheran Services in America  
Baltimore, MD

## **Lutheran Services in AmericaOnline Community: Lutheran Identity and Leadership**

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Bill is an ordained minister of the Evangelical Lutheran Church in America. He served parishes in York County, PA, before joining the staff of Lutheran Social Services of South Central Pennsylvania in 1999, serving as senior vice president for communications and outreach programs with experience in fundraising, communications, marketing and community services. He joined the staff of Lutheran Services in America (LSA) as vice president of system leadership and collaboration in November 2007. He holds master's degrees in divinity and sacred theology. Bill resides with his family in York, PA. He enjoys outdoor activities, skiing, reading and cooking.

## Innovation, Person-Centeredness and Transformational Leadership

My project is the development of an online community for the purpose of exploring the intersection of Lutheran identity and leadership for the members of LSA. I was drawn to the project through a discussion with Jill Schumann, President & CEO of LSA, when we wondered what it might look like to create a permeable discussion in an online community format. The project will touch the three core tenets of transformational change as leaders grow, innovation as they connect with new ideas and person-centered orientation as we share practices and experience.

## Leadership Influences

Relationships have significantly influenced the direction of this project, which now has become a larger effort, and will be much more fully integrated into the new LSA Web site. Jill Schumann's guidance has been very good in pushing me to interview a greater number of people in preparation. I have discovered partners in the staff of LSA and our member organizations who have keen interest, insight and ability. They are now enrolled in the project and want to be part of it. The project has moved from being my project to becoming "our" project.

## Turning Points

There were two important turning points. I discovered my vision was too small and that others were very helpful in shaping a greater vision. Leadership is about inspiring vision, but not necessarily controlling it. My strengths in connecting and welcoming people into a process have been affirmed. The other important turning point was the realization that there were others with technical and professional knowledge that could and would travel this road with me. There are more people who can help you get where you are going than you imagine. The leader's role is to inspire and guide.



## Moving Forward

I hope that the online community about Lutheran identity will be a vital place for leaders to discuss this important concern for LSA and that it will broaden also to a greater Christian and faith-based discussion. My hope is that it will not have strict boundaries. I also hope that it will connect in vital ways with many other aspects of the work of LSA and its members. It will be not only a tool, but a system for integrating the themes of identity and leadership in all the work of LSA and its members. As leaders grow, effectiveness in service will increase, as well.

## Key Learning

The discussions of *Primal Leadership* and *Good to Great* have been particularly useful, as well as the practice of appreciative inquiry and Judy's lecture on resonance and dissonance. I see the online community as one more place to connect these vital discussions to an even greater audience. In my current work in an alliance and professional services organization, this will take various forms. I see the online community as one tactic within a broader strategy. I also think I have grown more open to feedback and assistance from others. Leadership AAHSA has enhanced this dimension.



**Ruth Tietz**

Director of Marketing and Development  
Baptist Health System  
Scotia, NY

## “Seeds of Change:” Going Green for Our Aging Planet And Population

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Ruth began working at Baptist Health System in 2004 as director of public relations, responsible for evolving community relationships and external branding for the organization. In 2005, she was promoted to director of marketing and development. Since then, the Baptist Health System Foundation has grown significantly in resources and continues to provide scholarships for college-bound and returning education students entering health care. In 2007, a co-collaborative media program called “Six on Seniors,” developed in part by Ruth, received the AAHSA Public Trust Award. Prior to Baptist Health System, Ruth’s career spanned 20 years in media relations.

## **Innovation, Person-Centeredness and Transformational Leadership**

We all reside at the same home—planet Earth—and should share in the “care and feeding of it.” The “green” steps we take as individuals and health care providers today will greatly reduce our collective carbon footprint tomorrow and allow homes and services of the future to become more efficient and sustainable with less waste and damage to the environment and its residents. This project is innovative and transformational as it allows intergenerational participation throughout our organization. Many of our residents have lived through challenging economic times and understand that conservation of resources is timely and necessary for the future.

## **Leadership Influences**

Timothy Bartos, my mentor and supervisor, has an amazing capacity for big-picture planning and development. His vision has both encouraged and allowed me to take risks and tackle projects and concepts that aren't traditionally associated with our field. The project I have chosen also has allowed me to really get to know many of our residents at a much deeper level, as well as many of my coworkers who share and serve on the “Go Green” committee.

## **Turning Points**

A turning point for me was when I attended a resident council meeting to discuss the “Go Green” plans in development for Baptist, and I was greeted by the most enthusiastic, socially responsible group of residents. Prior to that, I had some apprehension about collective “buy-in” for this project. After that meeting, I knew we were heading in the right direction. The camaraderie of spirit that has been generated as a result of this project, both internally and beyond, has been a very pleasant surprise and fuels the desire to keep moving forward!

## **Moving Forward**

We have a “Go Green” committee made up of residents, staff and community business owners that meets to develop and implement strategies for resource conservation. A consumer electronics recycling event took place on Earth Day in April 2008 to kick off the project and was wildly successful with significant dollars being raised. Plans are underway to develop grants for sustainable energy programs, and “green” and environmentally correct design aspects are being implemented in our new building design plans. The project will continue to permeate all aspects of our operation and community involvement. It is a journey, not a destination!

## **Key Learning**

It has been such an amazing privilege to be able to collaborate with this group of emerging leaders in the 2008 Leadership AAHSA Class, who encompass so many rich talents. The Leaders in Residence sessions were particularly helpful and motivating for me. I now realize that there are so many ways to look at a particular issue or concept. It is nice to allow ourselves the luxury of “the balcony view” to really take stock of what is going on within ourselves and our organizations. As this knowledge relates to my action learning project, it allows me to recognize that the process is always fluid.



## **John Yost**

Risk/Safety Director, Senior Dining Director  
Kendal-Crosslands Communities  
Kennett Square, PA

# Yost

## **Developing a Group Purchasing Program for Kendal at Longwood And Crosslands Communities**

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John has been in health-related service for 26 years, starting in the acute care setting with responsibilities in dining, patient care redesign and many other projects. He joined Kendal-Crosslands Communities as senior dining director in 2000. Over the course of time, he has accepted the responsibilities of risk management director and chair of the safety program. John also has had the privilege of coordinating community-wide special projects, including but not limited to, implementation of a community-wide point of sale system, a successful CARF-CCAC accreditation survey and a committee for restructuring the pharmacy program.

## Innovation, Person-Centeredness and Transformational Leadership

This project originated after several conversations with the two executive directors from Kendal-Crosslands Communities to review options that would benefit the community as a whole. The project involves developing, organizing and implementing a group purchasing program for the communities utilizing GPOs and local vendors. This project will benefit the communities and residents and help in developing standardization of purchasing. The project represents a culture change within the organization and will include every department and their stakeholders. Many of the techniques, discussions and site visits will be beneficial as I move forward with the project.

## Leadership Influences

Positive relationships have been developed through other projects with many of the stakeholders and partners. The challenge is that departments will not have autonomy in selecting their own vendors of choice, which may include terminating long-standing relationships. It has been interesting to observe the changes, both positive and negative, in the stakeholders as they learn more about this project. As a leader, you need to be flexible and assess each situation independently. Being in a leadership role, you must stay objective but continually strive to meet goals which includes being flexible in working with individuals but constantly keeping your goals in mind. I feel the book *True North* demonstrates this aspect by staying the course to achieve the needed results.

## Turning Points

The one turning point was the commitment from both of my executive directors. It may prove to be a challenge obtaining stakeholder buy-in as this project moves forward due to program coordination between two communities. As I began to meet with all departmental stakeholders, I felt that it might be a challenge for them to accept program changes and actually embrace the ideas I developed in regard to the process, education and implementation.

## Moving Forward

Daily purchasing of goods and supplies will become routine, utilizing par levels and approved vendors of choice. Ongoing education will address inventory controls, par levels and the use of GPOs. The philosophy and principles may be applied as the culture change regarding capital purchases includes service contracts. In addition, inventory levels will be reduced and cross training will be implemented. Also, I envision that department inventories will be conducted on at least a quarterly basis, if not more frequently, which enables directors to better manage costs.

## Key Learning

The areas that stand out are the books *True North* and *Good to Great*. They both address, as many of the other books have, the theories and examples that apply to my project. The other experiences throughout the program have been relevant not only to the action learning, but to our careers. The exercises we have had the opportunity to participate in were very beneficial as you look at your inner self. My education through site visits and their management teams has reinforced why Leadership AAHSA was created. It demonstrates a commitment to address a need for executive leadership training.

# 2008

## Hosts

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AAHSA extends deep gratitude to the following member organizations for offering the Leadership AAHSA Class of 2008 Fellows the opportunity to experience real-world transformational practices and providing meeting space and logistical support.

**Elizabeth Seton Pediatric Center**  
New York, NY

**On Lok**  
San Francisco, CA

**Sarah Neuman Center for Healthcare and Rehabilitation**  
Mamaroneck, NY

**Selfhelp Community Services, Inc.**  
New York, NY

**The Hebrew Home for the Aged at Riverdale**  
Bronx, NY

**The Redwoods**  
Mill Valley, CA

**The Sequoias**  
San Francisco, CA

**Village on the Green**  
Orlando, FL

**Winter Park Towers and Village**  
Winter Park, FL

## Leaders in Residence

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AAHSA thanks the following aging services leaders for sharing their intimate professional and personal leadership stories with the Leadership AAHSA Class of 2008, allowing Fellows to learn from their first-hand experiences.

**Jerry Brown**  
Bethany Center Senior Housing  
San Francisco, CA

**Mike Dougherty**  
The Sequoias  
San Francisco, CA

**Maria Dwight**  
Gerontological Services, Inc.  
Santa Monica, CA

**J. Kevin Eckert**  
UMBC, The Erickson School  
Baltimore, MD

**Nancy Eldridge**  
Cathedral Square Corporation  
South Burlington, VT

**Rev. Willie Gable, Jr.**  
National Baptist Convention, USA, Inc.  
New Orleans, LA

**Barbara Gay**  
AAHSA  
Washington, DC

**Kevin Gerber**  
Episcopal Homes Foundation  
Lafayette, CA

**Jaclyn Harris**

Trinity Continuing Care Services  
Novi, MI

**Kris Hansen**

Western Home Communities  
Cedar Falls, IA

**Gerald Holder**

Council of Large Public Housing Authorities  
Washington, DC

**Barbara Hood**

Northern California Presbyterian Homes  
and Services, Inc.  
San Francisco, CA

**Robert Jenkins**

NCB Capital Impact  
Arlington, VA

**Kay Kallander**

American Baptist Homes of the West  
Pleasanton, CA

**Stuart Kaplan**

Selfhelp Community Services, Inc.  
New York, NY

**Mark Kator**

Isabella Geriatric Center  
New York, NY

**Linda Kirk**

Winter Park Towers & Village  
Winter Park, FL

**Rick Lusky**

Department of Applied Gerontology at UNT  
Denton, TX

**Connie March Curtis**

Provena Senior Services  
Mokena, IL

**Win Marshall**

Christian Church Homes of  
Northern California  
Oakland, CA

**Louise Maus**

AAHSA  
Washington, DC

**Stephen McAlilly**

United Methodist Senior Services  
of Mississippi  
Tupelo, MS

**Kevin McFeely**

The Kenney  
Seattle, WA

**Rita Morgan**

Sarah Neuman Center for Healthcare  
and Rehabilitation  
Mamaroneck, NY

**Peggy Mullan**

Beatitudes Campus  
Phoenix, AZ

**Todd Murch**

Eskaton  
Carmichael, CA

**Roger Myers**

Presbyterian Villages of Michigan  
Southfield, MI

**Greg Poole-Dayan**

Sarah Neuman Center for Healthcare  
and Rehabilitation  
Mamaroneck, NY

**Steve Protulis**

Elderly Housing Development and  
Operations Corporation  
Ft. Lauderdale, FL

**Dan Reingold**

Hebrew Home for the Aged  
Bronx, NY

**Michael Rosenblut**

Parker Jewish Institute for Health Care  
and Rehabilitation  
New Hyde Park, NY

**Mary Alice Ryan**

St. Andrew's Resources for Seniors  
St. Louis, MO

**Dr. William Smith**

Aging in America  
Bronx, NY

**G. David Sprowl**

Lutheran Towers  
Atlanta, GA

**Peter Szutu**

Center for Elders Independence  
Oakland, CA

**E. Kern Tomlin**

Presbyterian Villages of Michigan  
Southfield, MI

**Patricia Tursi**

Elizabeth Seton Pediatric Center  
New York, NY

**Linda Velgouse**

U.S. Administration on Aging  
Washington, DC

**Art Webb**

Village Care of New York  
New York, NY

**Katie Weiss**

Aging in America  
Bronx, NY

**Iara Woody**

AAHSA  
Washington, DC

**Carl Young**

NYAHS  
Albany, NY

## 2008 Faculty

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AAHSA is grateful for the unique gifts each faculty member brings to the Leadership AAHSA program. They serve as thought leaders, facilitators and advisors to the Fellows and make the critical connections between leadership theory and everyday practice.



**Judy Sorum  
Brown, PhD**

Academy of  
Leadership -  
University of  
Maryland  
College Park  
College Park, MD



**Michele  
Holleran, PhD**

Holleran Consulting  
& DeArment  
Consulting  
Crested Butte, CO

## Staff

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**Wendy Green**

Director, Leadership  
Development  
AAHSA  
Washington, DC



**Kirsten Jacobs**

Manager, Education  
Development  
AAHSA  
Washington, DC

## Coaches

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AAHSA is blessed to offer to the Fellows the rich background and expertise of the following 2008 coaches who regularly interface with Fellows to further the onsite learning and to offer their wisdom and guidance as experienced leaders in our field.



**Jerry Brown**

Bethany Center  
Senior Housing, Inc.  
San Francisco, CA



**Kay Kallander**

American Baptist  
Homes of the West  
Pleasanton, CA



**Kevin McFeely**

The Kenney  
Seattle, WA



**Connie March Curtis**

Provena Senior Services  
Mokena, IL

# Quality First Index

This index cross-references the Fellows’ action learning projects with the 10 Elements of Quality. For a wealth of information about AAHSA Quality First visit the Web site ([www.aahsa.org/qualityfirst](http://www.aahsa.org/qualityfirst)).

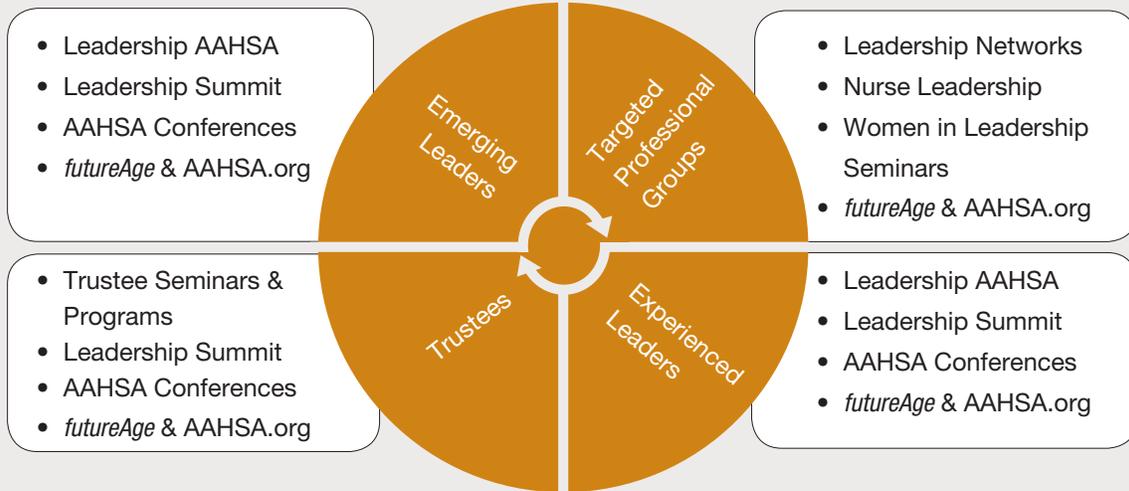
**Key:**

1. Commitment
2. Governance & Accountability
3. Leading-Edge Care & Services
4. Community Involvement
5. Continuous Quality Improvement
6. Human Resources Development
7. Consumer-Friendly Information
8. Consumer Participation
9. Research Findings & Education
10. Public Trust & Consumer Confidence

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# AAHSA LEADERSHIP ACADEMY

Developing and supporting talented individuals in AAHSA member organizations



## OUR OBJECTIVES:

- ◆ Expand the skills and capacities AAHSA members need to lead more effectively and advance their missions.
- ◆ Expose AAHSA members to contemporary and classic leadership theory, principles and practices.
- ◆ Enable AAHSA members to share with and learn from one another's real-life, hands-on experiences.
- ◆ Tell the stories of transformational leaders in aging services.

## OUR STRATEGIES:

### Leadership AAHSA

Year-long leadership programs for select groups of members focused on cultivating future leaders in aging services through experiential learning.

### Leadership Summit

Two-day interactive conferences focused on an in-depth, blended learning exploration of a specific leadership theme led by published leadership experts.

### Women in Leadership

Half-day workshops for women in aging services focused on gender-specific leadership education and networking opportunities.

### Trustee Programs

Half-day seminars and sessions for trustees in member organizations focused on the latest governance issues critical to aging services organizations.

### Leadership Networks

Networks of CEOs and COOs of multi-site organizations focused on shared learning around common executive leadership concerns and interests.

### Nurse Leadership

A growing evidence base of projects and publications focused on the leadership skills and core competencies for developing nurse leaders in long-term care.

### AAHSA Conferences

Annual Meetings, Future of Aging Services Conferences and targeted distance learning opportunities focused on leadership education.

### *futureAge* and AAHSA.org

White papers, articles and online resources focused on exposing members to a variety of leadership concepts and transformational ideas.



For more information about the AAHSA Leadership Academy contact us at (202) 508-9480.