

# 2009

## Leadership AAHSA



### Transformational Learning in Action



# Leadership AAHSA



# Class of 2009





# Welcome to the Leadership AAHSA Class of 2009!

It is my great pleasure to introduce you to the Leadership AAHSA Class of 2009 and the exciting journey in which they've participated over the past year. The efforts of these fine Fellows to expand their leadership capacity by taking part in the rigorous Leadership AAHSA program speaks volumes of 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 potential shortage of not-for-profit leaders nationwide, we launched Leadership AAHSA 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 Leadership AAHSA. The Fellows' passion for their projects, and the learning they acquired while working on this exercise, underscores their unique leadership gifts and potential.

Thank you, Fellows, for creating the future of aging services!

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 2009. This groundbreaking endeavor would not be possible without their ongoing support.  
*(as of September 2009)*

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American Baptist Homes  
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The Hebrew Home for the  
Aged at Riverdale  
Bronx, NY

Baptist Health Nursing and  
Rehabilitation Center  
Scotia, NY

Bethesda Health Group, Inc.  
Saint Louis, MO

St. Andrew's Resources for  
Seniors (STARS)  
Saint Louis, MO

The Terraces of Los Gatos  
Retirement Community  
Los Gatos, CA

Total Longterm Care—  
Capitol Center  
Denver, CO



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## Apply to Leadership AAHSA

Applications for the Leadership AAHSA Class of 2011 will be available in the spring of 2010. Please visit [www.aahsa.org/LeadershipAAHSA](http://www.aahsa.org/LeadershipAAHSA) for more information.

# A Transformational Year

**L**eadership AAHSA is created around three core ideas:  
Transformational Leadership — leadership that elevates  
the aspirations and performance of organizations; **Person-**  
**Centeredness**—a focus on the well-being of the individual person we  
serve as well as the individual staff member who provides that service; and



## Leading from the Mind and Spirit

**October 12-16, 2008** in conjunction with the AAHSA  
Annual Meeting & Exposition, Philadelphia, PA

*NewCourtland Germantown campus and Inglis House*



## Creating Home – The Heart and Science of Culture Change

**February 4-6, 2009** Fraser and Southfield, MI

*Trinity Senior Living Communities and Presbyterian  
Villages of Michigan*



## Building Networks and Partnerships

**April 18-22, 2009** in conjunction with the AAHSA Future  
of Aging Services Conference, Washington, D.C.

**Innovation**—changes at every level that create new ways of providing value. Our year-long curriculum, including site visits, theory, readings and exercises, builds on these three principles. The following audio clips offer a snapshot of the 2009 Leadership AAHSA experience.



**Sustaining an Ethic of Caring and Service**

**July 7-9, 2009**, Burlington, VT

*Cathedral Square Corporation*



**Passing it On – A Lifetime of Leadership**

**November 7-8, 2009** in conjunction with the AAHSA Annual Meeting & Exposition, Chicago, IL





# Cultivating Emerging Leaders in Aging Services

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-directed care.
- **Leadership theory** from a wide range of authors and experts generates discussions about the practical connections to our field, including emerging trends and important policy issues.
- **Self-evaluation exercises** 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.
- **Virtual peer-to-peer interaction**, facilitated by an online learning community and monthly conference calls, fosters continued sharing and engagement among the Fellows, faculty and coaches.
- **The Leadership AAHSA Alumni Network** provides an opportunity to continue learning and advancing the field of aging services through leadership, service, innovation, shared learning and fellowship.



## Action Learning Projects



The Leadership AAHSA Fellow's year-long experience culminates in an action learning project. These projects are 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:

- How would you describe your project and the difference you hope it will make to advance your organization's mission (or the field) and benefit the individuals you serve?
- How have the relationships you developed as part of your project (with mentors, partners, stakeholders, etc.) influenced its direction? How have those relationships influenced you as a leader?
- What have been important turning points for you, in your own learning, as you engaged with the action learning process?
- How do you hope your project might unfold in the months and years ahead? What impact do you hope it will have on the field at large?
- How has the action learning process, in the context of the Leadership AAHSA experience, contributed to your growth as a leader?

Their insights and observations are compiled in the following pages.



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Shiela A. Brown



## Face to Face

Our county is an agricultural community composed of predominately older farmers who inherited their land from previous generations. They are very proud of their heritage and desire to live their final years in the rural community they have built. Our vision for the future is to meet the changing needs of the people we serve, remain technologically advanced, promote greater community awareness, and capitalize on relationships that facilitate the delivery of care on a local level. It's this unique ruralness that has made me a service advocate. So, when a staff member spoke of talking to her son in Iraq using a webcam, it was an "aha" moment. Now, residents at Lone Tree Retirement Center are speaking face to face with family living miles apart using this technology.

## Leadership Influences

Last December, with families gathered here for Christmas, there was an employee who talked about seeing her son in Iraq using a webcam; her family could see him, speak with him and then move the webcam about the room. Lone Tree took this concept to residents

and families. First, the residents became involved, having heard that the webcam would be like a telephone only you could see the other person. Family members were then identified who might become involved in Lone Tree's webcam project. Finally, staff became involved in the excitement and offered to pay for the families' webcams. They used the employee fund, which is composed of money from a vending machine and fundraisers. The purpose of the fund is to enhance the quality of life for residents who live here. Discussion among the groups about logistics, families gathered at Christmas, a mother's and son's long-distance communications, and willing and giving staff members all gave structure and energy to the project. For me, it magnified the power of relationships, which have become my building blocks as a leader.

## Turning Points

Initially, my action learning project topic explored the survey process. However, after our last site visit to Cathedral Square in Burlington, Vt., I realized more than ever before that Lone Tree Retirement Center is my passion. I subsequently changed my topic to something more relevant to Lone Tree. When

making this change, I learned I am passionate about Lone Tree Retirement Center and our innovative practices to provide services. I also learned about the courage it takes to make a change. Larry Minnix, AAHSA CEO, has made reference to servant advocates; in rural areas we have become service advocates, having in-house podiatry, basic dental service, optometry, hospice, massage therapy and now webcams. This has become a significant achievement during my time at Lone Tree, because it symbolizes the innovations occurring in long-term care, one of which is connectivity. Residents and their relationships are no longer confined to the care home. For me,

my personal commitment to aging services is to provide leadership — a type of leadership that will make a difference as defined by person-centered care.

## Moving Forward

Elders want quality care, compassionate care and connectivity to the larger community. I hope the majority of our residents and families will participate in Lone Tree's webcam project. As technology advances, it will play a greater role in quality care, including connecting elders with their families; with these advancements, I have visions of interactive screens in every room. As the field at large moves more toward culture change involving



person-centered care and innovations, there is the realization of what elders need and how technology can deliver. Just reading about Face to Face could inspire others to provide technology or assist elders with technology so that memories are created across the miles. Imagine a grandmother in Kansas and a great-granddaughter in Arizona talking and seeing each other in real time on a computer screen using a webcam. This is their first opportunity to communicate and get to know each other in a way that would otherwise be impossible.

### Key Learning

I have a heightened awareness that universal leadership principles can be taught and then applied. The action learning project seemed to be the application of these principles involving mission, goals and relationships. These were common topics in the reading materials and classroom presentations and recognizable at the site visits. In summary, the action learning project serves as a micro blueprint for a transformational leader. As a result of this information, I feel I grew as a leader throughout the year. I found myself inviting discourse, welcoming different perspectives, being transparent, and making

sure everyone is on the bus and in the right seat. I know the future of aging services will be to provide quality of care and choices meshed with connectivity to one's concept of home and community. T.S. Eliot says, "We shall not cease from exploration. And the end of all our exploring will be to arrive where we started. And know the place for the first time." In summary, I know requirements of different tasks and can use appropriate leadership strategies most effectively in working productively with people. I have a need to continually change in order to successfully lead a changing environment and circumstances.

### Bio Summary

Sheila is the director of Lone Tree Retirement Center, and she is currently serving as president of the Meade Council on Aging. She has a Master of Science in education from the University of Iowa. She retired from high school counseling and assumed the director's position at Lone Tree in 2005, having worked there as a part-time certified nursing assistant for 17 years. She was recently elected to the local school board, which allows her to continue meshing her interests of young people and elders. 🌱

Joyce Dirkes Chavez



## Increasing the Depth of Services In a Residential Community

I am transitioning dementia, bedridden and hospice care into a primarily assisted living community. This shift is being driven by the changing needs of our population. Motion Picture & Television Fund's skilled nursing home will be phased out in favor of community-based services. The capacity of the residential care facility for the elderly (RCFE) license is being increased so that services previously offered in skilled nursing can be transitioned to it. The benefits will include fewer transfers to higher levels of care, the ability to stay with a spouse who may have different care needs, and aging in place.

## Leadership Influences

This experience exposed me to planning on a higher, more complex level. I have a better understanding of the relationships and influences that must be considered when getting participants from varying points of view to create a common goal and build a pathway to meet it. There is a large amount of uncertainty and pressure that must be absorbed being on the cutting edge of a new vision. The challenge

of transforming current processes to be consistent with that new vision, while maintaining positive energy to achieve the goal, can almost be paralytic. At this juncture, one must rely on relationships to create common understanding and trust.

## Turning Points

The process has taken much longer than I expected. I have learned that, although it is uncomfortable being in a holding pattern, there are often no answers other than those born through time. Solutions that are not always apparent at the beginning present themselves as time creates circumstantial change. Another observation is how much the achievement of targets brought validation to my work and, indirectly, to me as a person. I have found that being still, listening and considering are very important tasks. I am able to see value in the optimal balance of vision and action more readily now.

## Moving Forward

By the end of this year, I hope to have our dementia unit licensed and up and running. The palliative care team is beginning to work closely with hospice agencies to identify how they will collaborate in the care of our residents. The care staff

will be hired and trained. Support services will be identified and implemented to ensure a smooth transition. It is my hope that we will be an example to the field of how much can be done in an RCFE, allowing people to age in place.

### Key Learning

Leadership AAHSA has exposed me to aging services leaders across the nation from different job categories and backgrounds. I am able to see a much broader picture, not only of the challenges, but also the opportunities to bring care and services to seniors. If I have questions about housing, finance, human resources, quality, skilled

care, dementia or acute care, I suddenly have 30-plus Fellows and coaches I can telescope out to who will share their experiences. That is a lot of strong support to help me solve whatever problem is found under my microscope today.

### Bio Summary

Joyce became an RCFE administrator after 20 years in various health care settings as a hospitality manager and registered dietitian. Her life's work is to make a difference by respecting others and encouraging them to find joy and purposefulness in the short moments we string together and call our lives. 🌱

“I have found that being still, listening and considering are very important tasks.”



Angela S. Dailey



## Succession Planning and the Transfer of Organizational Knowledge

At Brewster Place, our mission is to give our residents an optimal quality of life. As leaders of our organization, we need to do that seamlessly. We have found that most of the knowledge leaves when a key leader leaves their employment with us. We also found that we really didn't have a good candidate to keep us moving forward in that area. As an organization, we need to capture and transfer knowledge and also develop future leaders to ensure seamless transition when change occurs.

## Leadership Influences

I have grown as a leader to understand the need for diverse relationships. I now approach projects and change from a perspective that places a focus on building a diverse team prior to implementing the change or project. A leader has to be part of a team. That team has to be motivated, creative and supportive — and advocate for each other. Relationships are strengthened and commitments solidified when the

process is inclusive of all of your partners and stakeholders.

## Turning Points

A turning point in developing this process was when I realized that this project wasn't just about writing a process and policy. My action learning project will empower staff in developing their own leadership and, in the process, engage them in their own professional development.

## Moving Forward

My project will create a strategy for determining key positions within our organization. From these key positions, we will capture detailed knowledge needed in that position. This knowledge will allow us to develop a structure to transfer knowledge. We will also prepare those staff with leadership potential for future opportunities in key positions within our organization. This process will be ongoing and updated annually to ensure changes in the organization or specific positions are up to date.

## Key Learning

My experience with Leadership AAHSA has shown me the importance of diversity in relationships. You cannot be held

back by your own work function or business type. The knowledge I gained by sitting down and speaking with leaders to understand their challenges and successes during the Leaders in Residence functions has been a treasure. It gave me confidence to build diverse relationships to ensure the success of my action learning process. I have also learned that my growth as a leader is a journey. It is ever-changing and can have an ongoing impact on the future of aging services.

## Bio Summary

Angela has served as vice president of quality and human resources for Brewster Place Retirement Community since 1999. She currently serves on the board of trustees of the Kansas Association of Homes and Services for the Aging Workers Compensation Pool (KING). Angela earned her Bachelor of Science from Emporia State University. She is a state and national member of the Society for Human Resource Management. 🌱

“The knowledge I gained by sitting down and speaking with leaders to understand their challenges and successes during the Leaders in Residence functions has been a treasure.”



Elizabeth Donovan



## Eskaton Village Carmichael Master Planning Project

The project is a collaborative approach to expanding and repositioning an existing continuing care retirement community (CCRC). Our collaborative approach includes campus staff, corporate staff and CCRC residents, whose input is invaluable. The expansion project team is considering many options for expansion, which will include innovative and unique strategies to continue Eskaton's reputation of innovative, livable design. This project is envisioned to be an example of an innovative approach to meeting the needs of seniors in a way that can be duplicated within the organization as well as throughout the field.

## Leadership Influences

My growth, development and professional relationship with our CEO and other executives has been strengthened throughout this process. My sponsor and coach in my Leadership AAHSA experience is our CEO. He has not only provided support and encouragement, but has also taken on an active role as a member of our development team for this

project. My relationship with the residents who are on the ad-hoc committee for this project has helped solidify my commitment to ensuring that the best and most innovative services are provided to them.

## Turning Points

What has stood out for me is the amount of expertise, knowledge and support that is available within my own organization. The challenges have motivated me to go outside my comfort zone and see what might be possible. Eskaton is an organization on the cutting edge of senior services, and I feel that this project will get the support and guidance to allow it to be successful. The involvement of the residents has really been a great eye opener for me and our team, as we hear directly from them what they want, need and hope for.

## Moving Forward

I envision a service design that is not only innovative and new, but also provides the framework for other organizations to duplicate. The result will be one of high quality and innovation. The process itself will represent an innovative and collaborative methodology that is derived through a person-

centered approach to an innovative provision of services. The ideas and possibilities brought forth within the project will be used in other similar Eskaton projects. The process and result will be transferrable to other repositioning projects, both within my organization and throughout the field.

### Key Learning

The Leadership AAHSA experience has allowed me to approach my action learning project with greater understanding of my role as a leader and my motivation through introspective reflection. The readings, site visits and networking with the group have benefitted me in many areas of my professional and personal life. I feel I ask better questions and am more open to others' thoughts and perspectives. The tools I've gained and the personal connections I have made will stay with me for many years to come.

### Bio Summary

Betsy Donovan has been the executive director of Eskaton Village Carmichael since 2006. Eskaton Village is a 37-acre CCRC. Betsy has worked for nearly 25 years in the health care field and has a master's degree in health care administration and a bachelor's degree in recreation therapy. 🌱





“What has stood out for me is the amount of expertise, knowledge and support that is available within my own organization.”

Meredith Schell Fields



## Creating a Quality First Indexing Tool

How does an organization move through the change to person-centeredness and still ensure that quality is maintained in a way that incorporates the true stakeholders in the process? This project originated from a quality improvement perspective during the introduction of culture change within our organization. The voices of our residents and employees are the driving force in our journey. Who better to rate the level of quality than those who are impacted the most? Not only will we as an organization learn and improve from the responses of the residents and employees, but the methods used will establish a benchmark to compare progress in the Quality First journey. Additionally, stakeholders will begin their own transformation using their voice and opinions. They will be able to trust that the organization is listening and responding.

### Leadership Influences

My project would not be able to move forward without the support of my sponsor Dr. Emerson Leshner, president of Messiah Village, who values the thoughts and opinions

of the people we serve. I also want to thank my mentor, Michele Holleran, who provided the tools and knowledge to guide me through this learning process. Just as importantly, I was fortunate to have a group of residents act as my focus group. They critiqued the tools used in the project, which were created by very talented behind-the-scenes partners. My bus is filled with the right people. As a leader, it is important to know those you are serving and let them also know you. Good relationships are the beginnings to collaboration, shared vision and personal and professional growth.

### Turning Points

A turning point was the realization that, to be a true transformational leader in this project and in my work, I would need to inspire the people I would come to rely on to move the project forward. My hope was to ignite in them the excitement and passion I have for quality. The challenging part of the project was ensuring that enough stakeholders would want to participate in the process to get a viable response rate. All areas of our organization were asked to voluntarily participate in answering questions regarding quality through the AAHSA Quality

First Key Elements. Our overall average of an 82 percent response rate was a result of communication, explanation and the practice of resonant leadership.

## Moving Forward

My vision is to continue this Quality First measurement tool in the upcoming years at our organization. I hope to improve upon the good things we do every day in order to become great, never accepting that what we do is good enough. Comparisons of internal Quality First benchmarks over the next few years can help our organization. We'll be able to identify areas of strength and opportunities for growth, while allowing the voices of the resident and employees to guide us.

## Key Learning

Leadership AAHSA has exceeded my every expectation. A year ago, I was asked what I would like to gain from this fellowship experience. My answer was to expand my vision of cultural transformation and person-centered care; encourage the empowerment of older adults; make meaningful connections with others who have the same passion and commitment to aging services; and use the experience as an opportunity for self growth and personal transformation. This year has been precious, because

these goals have coalesced and confirmed for me that aging services is part of my "true north." I take away from this journey a strong want to continue to be innovative, creative, forward thinking and passionate about my work. I have filled my treasure chest with theories, concepts and crucible moments. Most importantly, I have gained beautiful relationships with Fellows who were courageous and vulnerable enough to take this journey.

## Bio Summary

Meredith has been dedicated to the aging services field for the past 13 years. She served as a Pennsylvania Department of Health State Surveyor for six years and received her nursing home administrators license in 2004. Meredith joined Messiah Village in 2006 as the director of quality improvement. She is responsible for the overall effectiveness of village-wide quality improvement, risk management and corporate compliance. 🌱



Sheri Filak-Taylor



## Coordinating Care Services in Affordable Housing: An Integrated Approach

The purpose of my project is integration of health and social services in an affordable housing community. Doing this would allow aging adults to be served before a catastrophic event takes place. It would provide an avenue of coordinated services for many seniors who don't meet the requirements of current community programs. Development of an infrastructure to support community-based services will meet the demands of this generation. For our organization, this model will identify residents that need services before they qualify for the Program of All-Inclusive Care for the Elderly (PACE). It will create an opportunity for delivery of services to maintain residents at the lowest level of care.

## Leadership Influences

The relationships that are developing with the residents at Pinewood Lodge have been the catalyst for exploration and development of this initiative. Seeing and understanding the excitement of the residents in the discovery phase has inspired and motivated

Total Longterm Care to support the creation and implementation plan to develop this project. The power of synergy within a group of committed individuals is inspiring to me and creates a powerful and positive message for the senior community at Pinewood Lodge.

## Turning Points

I am often reminded that, in the field of aging services, the landscape is constantly changing. Flexibility is a critical aspect of leading a new initiative. Sometimes, as leaders, we think we have the answers. But allowing discovery and self reflection can be a key element of success. This happened for me as Total Longterm Care moved into the housing business. Listening to the residents and their desires has guided the direction of my action learning project — development of integrated community services in affordable housing.

## Moving Forward

My hope is this project will create a safe and desirable service model that allows seniors to age safely in their affordable housing communities. The objective of this project is to develop a coordinated system of care that utilizes the services of both the PACE

model and community models of integrated service-delivery systems. The potential impact of this project is quality of life and improved health outcomes for seniors in this country. Research implies that future senior care will likely be a community-based model, which can fulfill the marketplace desires of the future.

### Key Learning

The action learning process has been a journey that has provided learning opportunities for both my professional and personal growth as a leader. I found that two important concepts are listening in the moment and asking softball questions, questions only the residents can answer. The book *True North* discussed our life story and understanding the life story of others. Understanding this concept was beneficial in developing my action learning project, *Coordinating Care Services In Affordable Housing: An Integrated Approach*. My hope as a leader is to remain true to many of the concepts that are part of the Leadership AASHA program.

### Bio Summary

Sheri has been a member of the executive leadership team for Total Longterm Care since 2001, and is



currently the chief operating officer. Total Longterm Care is one of the largest providers for the Program of All-Inclusive Care for the Elderly (PACE) in the country. Sheri received her bachelor's in nursing from Regis University and her master's in business administration from The University of Phoenix. She lives in Denver, Colo., with her husband Robert and enjoys spending time with her four grown children. 🌱



“The potential impact of this project is quality of life and improved health outcomes for seniors in this country.”

Melissa M. Fortner



## Furthering Your Mission Through Performance Excellence

Most organizations focus on various quality aspects and are truly striving to meet a range of goals. However, many organizations like VMRC have not fully aligned their mission with an inclusive framework to ensure that management systems are comprehensive and include time-tested principles for achieving and monitoring quality in day-to-day services. My project will meet the strategic initiative of implementing the performance excellence program to further align, measure and ensure outcomes organization-wide. By evaluating such best practices as Malcolm Baldrige, Quality First, CARF-CCAC, Six Sigma, and Lean Thinking, we will identify the integrated framework that enables excellence in performance.

## Leadership Influences

I am developing relationships as the project unfolds. For this project, I am learning that multiple mentors are invaluable. With each step and model being evaluated, I am finding that related relationships can further the design, thinking and even the soundness of an initiative. Between

my sponsor, coach and several specialists in strategic planning, performance management and quality frameworks, my project has been enhanced with better planning and a broader blueprint. These various relationships affirm for me as a leader the value of taking the time to engage and build relationships for gaining knowledge you cannot gain otherwise.

## Turning Points

My project has encountered a significant delay beyond the planning stage. However, this turned out to be important, not only for the project, but my learning as a leader as well. The project was fully designed, and the committee had mapped out the research and benchmarking which would occur. The timeframe was set for discovery, analyzing, decision and implementation. With the project put on hold due to another priority strategic issue, I spent time re-evaluating the project design. The additional time assessing the plan netted a more robust design, including better organizational assessment and a more focused approach with benchmarking.

## Moving Forward

After the benchmarking phase, the plan includes implementation of the ideal performance excellence program. For VMRC, this project will culminate in aligning, measuring and ensuring outcomes to our mission and vision. Whether an organization has a continuous quality improvement philosophy or utilizes a clinical dashboard, a unified culture of excellence is needed. Integration of management systems within an aligned framework ensures one's purpose is optimized. For our industry at large, my hope is to demonstrate the value of adopting an organization-wide quality framework, and to share our discovery for even better practices for elders.

## Key Learning

Leadership AAHSA has been a transformative experience for me in expanding my approach to leadership. New tools and thinking were shared. My action learning project is a great take-away and example of how this program has given me the chance to engage other professionals and to apply new thinking. I have appreciated the Leadership AAHSA design, which included book readings, theory review and numerous discussions. I identified with and will remember many beneficial concepts including

the balcony questions, creating resonance, reframing, and Level 5 Leadership. I will continue to enjoy the relationships we formed.

## Bio Summary

Melissa Fortner has served in senior care management since 1992. She holds a Bachelor of Science in health care administration and a master's in business administration. Currently Melissa oversees nursing and assisted living at VMRC, and is a member of the executive team. She is a CASP graduate. Melissa and her husband Brian have two children. 🌱



“These various relationships affirm for me as a leader the value of taking the time to engage and build relationships for gaining knowledge you cannot gain otherwise.”

Gregory C. Garrett



## First Annual Bay Area Senior Health Care Policy Forum

This forum will create a dialogue between hundreds of the Bay Area's top senior advocates and policy makers to help bring ethical change to our system for elder care. Policy makers will provide insight into the changing health care landscape, and local senior advocates will have their voice and concerns heard by key policy makers and create action plans for the future. As the sponsor of the forum, CEI will gain higher visibility from legislators as well as solidify existing and future partnerships with organizations with similar missions.

## Leadership Influences

This project has provided me a platform to coordinate an event involving many of the most knowledgeable senior health care services providers and advocates in the Bay Area. Additionally, I have now been in direct communication with most federal, state and local legislators representing our regions to inform them of the event and invite their participation. One lesson quickly learned was to keep my mind open to new ideas and even divergent ideas; compromise is

a necessary leadership skill. But through compromise comes the involvement of many different viewpoints, making the event more diverse and informative for those who attend.

## Turning Points

An important turning point was when I truly began to practice the lesson of listening. At first, I felt a kind of ownership over the design of the forum. However, the act of listening led me to appreciate the amazing talent around me and the fact that their input has enhanced the event in ways I could not have imagined.

## Moving Forward

I hope the event becomes an annual affair, recognized around the Bay Area as an effective forum for advocates, providers and policy makers in the senior health arena. The goal is to share ideas, advocate for necessary change and create lasting partnerships among related organizations. We hope to also create awareness of the vital safety-net role these organizations play in the lives of Bay Area seniors, rich and poor.

## Key Learning

The action learning process has taught me that being truly innovative requires the skill of being a good listener. What we learned in our Leadership AAHSA experience was that there are many different backgrounds from which leaders come. By listening to those other voices, we enhance our own character and our own style of leadership. Another lesson is that viewing an initiative like the Senior Health Care Policy Forum as a process, rather than simply a project, gives life and value to the act. Experiencing this as a process allows for growth and learning, whereas a project can be lifeless and stagnant.

## Bio Summary

Greg is the director of government affairs and real estate development for the Center for Elders Independence, a Bay Area provider of the Program of All-Inclusive Care for the Elderly (PACE). Previously Greg was vice president of housing development for a local affordable housing development company and a division director in Community and Economic Development with the City of Oakland. 🌱





“One lesson quickly learned was to keep my mind open to new ideas and even divergent ideas; compromise is a necessary leadership skill.”

Lora Gombac



## Creating Home for the Residents of Maple Farm

In order to extend our mission of enriching the lives of older adults as an expression of Christ's love, Garden Spot Village is in the process of purchasing Maple Farm, a stand-alone skilled nursing center. Maple Farm sits on 64 acres of rolling farmland and is located about 15 miles from Garden Spot Village. Our vision for this project is to bring Garden Spot Village's Household Model for skilled nursing to Maple Farm in order to enhance, engage and enrich the lives of the residents who live there. As the leader of this project, I hope to begin the journey of culture change, which will include redefining and creating home for our residents. Through the acquisition, we want Maple Farm staff to feel supported as valuable members of the Garden Spot Village team. For the 900-plus residents of Garden Spot Village, we hope that they will benefit from having a second option for quality, person-centered care if the need for skilled nursing should arise.

## Leadership Influences

Over the last six months, I have developed valuable relationships with the Garden Spot Village team members who serve in the Households of the skilled nursing center. My mentors include nursing assistants, homemakers, nurses and social workers. They are the people that have demonstrated person-centered care for me on a daily basis. The administrator and director of nursing have been especially instrumental in influencing the direction of this project. They have openly shared the successes and challenges of their culture change journey. Garden Spot Village's education committee has taught me how to maintain the momentum of culture change after construction and initial training are complete. The person most influential to me during this process has been my sponsor and mentor. He has influenced me as a leader through his passion for creating home and a sense of community for our residents. He provides a clear vision of excellence and innovation for his team, and he empowers those around him through his energy and excitement. He has perfected the art of leading from the balcony while supporting his team and staying connected to the people he serves.

## Turning Points

The action learning project for me has not only been engaging, but it has been an opportunity to be creative and forward thinking. The acquisition of Maple Farm is uncharted territory for Garden Spot Village. With the support of my sponsor, I have had the opportunity to use my authentic leadership abilities to forge the way. A few unexpected challenges would be the extent of the operational issues including worker's compensation and the amount of agency staffing at Maple Farm.

## Moving Forward

As the project has unfolded over the last few weeks, we were intentional about incorporating culture change into our initial welcome meetings with the Maple Farm staff. Our first meetings included person-centered care, our culture of employee health and safety, and the overall mission of our organization. The message that has been shared with the Maple Farm staff consistently is that change will happen, but it will happen through input (from the staff and residents), a transition plan with time frames, and constant communication. Over the next year, we hope to impact our field at large with a successful model for how to integrate culture change and person-centered care in the midst of an acquisition.

## Key Learning

The leadership AAHSA experience has been a turning point in my career. It has given me the courage and confidence in my own leadership abilities to accept a new position with a new organization. It has given me the resources and knowledge to show team members at all levels of the organization that leadership is important no matter what role you fulfill. This experience has shown me that holding people accountable, positive bottom lines and assertiveness are all noble attributes in a leader. However, emotional intelligence, relationship building and authenticity are equally important to inspiring people to move with you toward a common vision. Finally, the program has given me a support system of colleagues that I can call on at any time.

## Bio Summary

Lora serves as the executive director at Maple Farm, a Garden Spot Village Community. She began her career in senior living 19 years ago as a certified nursing assistant. Her experience includes the development and accreditation of a 24-bed dementia program. After becoming a licensed nursing home administrator in 2000, she spent five years as the administrator at Manatawny



Manor with Diakon Lutheran Social Ministries. Most recently, she served as the administrator at Rosemont Presbyterian Village, a community of Presby's Inspired Life. Her undergraduate studies were in health policy administration with

a minor in business. She also has a master's degree in health care administration with a certificate in long-term care. She enjoys golfing with her husband, Bob, and spending time with their two children, RJ and Ainsely. 🌱

Michael Gordon



## Skilled Nursing Facility Acuity-Based Staffing Model

I hope to implement an acuity-based nurse staffing model to provide standardization and accountability. The 10 skilled nursing facilities (SNFs) operated by Provena Senior Services have autonomy to establish their own staffing. Amongst the 10 SNFs there is significant variation in staffing. The staffing tool will factor in the case-mix index, number of daily admissions and discharges, physical layout of the nursing home, and prospective impact on the Centers for Medicare & Medicaid Services five-star rating system. The variance measurement reporting and increased accountability will enhance stewardship of organizational resources. We will be able to reinvest cost savings in capital expenditures identified as key ingredients of advancing the system's culture change initiatives and ensure sustainability of our business model.

## Leadership Influences

My relationships with team members have given me a more complete perspective on what I want to accomplish. The application

of the "Cone in the Box" and "Rule of Six" theories during this process has been very helpful. My mentor has helped me appreciate the broad perspectives involved. The members of our standardization steering team represent different disciplines and therefore have unique perspectives in the benefits and hazards of the initiative. From presentations to the directors of nursing, we have better appreciation of their perspective. During my shadowing of the direct care staff, I gained a better perspective of their daily responsibilities. After we invested several months identifying this project, a system-level senior leader suggested we consider using an outside consultant to determine our staffing patterns. We were able to convince the senior leader to allow us more time to accomplish this adaptive change internally. This recommendation has assisted in uniting our group in creating a staffing pattern ourselves. Because this is an adaptive change as it relates to our culture, I feel a staffing solution created within will be more sustainable as a result of all parties impacted having ownership in the staffing tool.

## Turning Points

The important turning point has been the application of leadership styles to loosen my grip on the final solution. We have engaged all stakeholders in the project to assure we are gaining all perspectives as we design a solution. Although the speed at which a solution is determined is delayed, the effectiveness of the change will be lasting as a result of the approach. I feel the project is moving in a way that empowers the staff to feel confident in their assumptions and plans. It should eliminate the need to have outside consultants solve this issue for us.

## Moving Forward

My hope is that this model will move forward in the design and implementation. Success in executing universal compliance

with a new staffing pattern tool will result in adequate staffing to allow us to continue to deliver patient/resident quality expectations and guard against excessive cost. The discipline to establish daily staffing patterns commensurate with the census and acuity of our patients will help us be wise financial stewards. The benefit of the stewardship will be maintaining our favorable quality reputation and generation of optimal cash flow. This will allow us to reinvest resources in our ministries to advance culture change and assure the sustainability of our business model.

## Key Learning

Studying leadership theory while simultaneously leading this initiative has contributed to a reflective awareness of the application of theory to practical application.

“We have engaged all stakeholders in the project to assure we are gaining all perspectives as we design a solution.”



Ron Heifetz's book, *Leadership Without Easy Answers*, introduced the leadership methods to mobilize adaptive work. The adaptive change versus technical change requires a much different approach for long-term success. My action learning project is an adaptive change within our organization. Daniel Goleman's book, *Primal Leadership*, describes various leadership styles and use of emotional intelligence to determine when to use each style. The visionary and affiliative style is most appropriate when leading positive long-lasting organizational change. The program has increased my self awareness of my preferred leadership styles. The project I am leading in our organization has been an ideal case study for me in leading adaptive change.

## Bio Summary

Michael has been the chief financial officer and vice president of finance and housing for Provena Senior Services since 2001. He is responsible for all financial aspects, internal controls and compliance of the finance function. Also, he is responsible for independent and assisted living housing operations. He earned his master's in business administration from Olivet Nazarene University in 1999. He is a licensed nursing home administrator, certified aging services professional and certified public accountant. He is married to his wife Lori. They are parents of Mitchell and Elyse. 🌱

Dennis G. Grindel



## Development of a Leadership Training Program for Lutheran Senior Services

The process of developing a leadership training program for Lutheran Senior Services is integral to sustaining our high standards in caring for and serving our aging population. Since the aging services field is rapidly changing, our leaders must show competence and caring in order to fulfill our mission of “older adults living life to the fullest.” We can accomplish this by growing leaders within our organization whose focus is servant leadership and who believe wholeheartedly in person-centered care, as well as being open to and adaptable to the constant changes and challenges in providing care for our seniors.

## Leadership Influences

My action learning project allowed me to speak in depth to each one of the senior leaders within our organization about what attributes are important in leadership. The opportunity to have those conversations was a tremendous learning experience in itself, and has had a profound influence on my own leadership development. The relationships have made me more

confident in my own leadership style. They have also taught me that leadership is not necessarily having all the right answers, but being articulate enough to ask the right questions and open to hearing the forthcoming answers.

## Turning Points

One of the surprising aspects of my project is how intent my organization has been on getting as much input from as many employees as possible. This will allow us to develop a training program that works and fits our organization. Virtually every employee, either through the learning circle process or individual interviews, has had the opportunity to give input on what they believe makes a good leader at Lutheran Senior Services. The use of the learning circle, or focus group, has been a great tool for us, and participating and leading these has been a wonderful opportunity for me.

## Moving Forward

The goal of my project is to implement a curriculum of leadership training for our organization. But beyond that is the expectation that the program itself will be seen as so effective other

senior service organizations in our metropolitan area will want to utilize it for their employees. In this way, we will have a lasting impact on the aging services field. We hope to be a model program for organizations wishing to develop something similar.

## Key Learning

The project has allowed me to take much of the theory of leadership and apply it to a specific project in the service of my organization. I have seen firsthand how what we have learned can be applied to concrete situations back home. I have also been inspired by the fact that my own organization is committed to cultivating leaders within its own ranks and challenging them to reach their full potential. Leadership AAHSA has been, for me, a life-changing experience through relationships, self-reflection and learning how to be a more effective leader in the aging services field.

## Bio Summary

Dennis has been in the aging services field for more than 18 years and in affordable housing since 1995. He has a strong background in the HUD Section 202 program. Dennis received his bachelor's in social sciences from Conception Seminary College and master's in theology from St. Louis University. 🌱





“The project has allowed me to take much of the theory of leadership and apply it to a specific project in the service of my organization.”

Velma Haye



## Like Crabs In a Barrel: Can Person-Centered Care Help?

I am writing a book that encapsulates my experience and observation of relationships in health care. The goal is to bring about transformational changes on a personal or cultural level. Considering that good relationships are foundational to success, upon reading these pages, readers will begin a process of self-examination. They will realize how their actions or inaction can contribute to faulty relationships and/or create obstacles to advancement in elevating health care. In addition, the workbook can be used as an educational tool in orientation programs. It will address inter- and intra-departmental relationships, thus benefiting the individuals that we serve.

## Leadership Influences

As I seek the perspective of each member or group of members in our team, relationships are developed. This influenced the direction of the project, because the information needed to undertake this project is empirical research. It is readily available from these sources and does not require too

much of an analytical approach. I have been influenced as a leader in that I am more conscious to lead by example, focusing intently on my communication. I recognize that my relationship-building efforts are being scrutinized on an ongoing basis as we embrace the person-centered care philosophy.

## Turning Points

I have discovered through individual conversations that most people desire successful outcomes. However, when placed in a group, their goals are side-tracked by group dynamics. An important turning point was realizing that individuals can detect when something is wrong with relationships, but are unwilling to confront the cause as a group. Meetings after the meeting are an indication of the need for trusting relationships. In addition, I have also come to realize that I need to spend time managing myself by constantly examining my character, goals, ethics and motivational strengths as I aim to be a transformational leader.

## Moving Forward

I am hoping that my project will empower others in personal reflection that will bring about transformational change

personally and/or culturally in our organizations. I hope that the concepts presented in this book will influence mindset and communication — and change the jargon in health care to reflect person-centered care. Above all, I hope to see action translated as a change in our attitudes toward each other, and a greater desire to work more as teams. I am trusting that this book will help raise the level of our commitment to each other and to aging services.

### Key Learning

Leadership AAHSA has been a phenomenal experience. The concept of self reflection, which underscores the project, has been the common thread in all the tenets of leadership that we have explored. I have learned through Leadership AAHSA, not only to self reflect, but to embrace the perspective of others and the knowledge that diversity influences innovation. I have come to realize that everyone has a “true north,” a set of values and beliefs that shape the way they lead. I have used these tools as I gather information for my project and have found them to be very useful.

### Bio Summary

Velma is a Leadership AAHSA 2009 Fellow and presently the



Director of Nursing for Cabrini of Westchester. She is a registered professional nurse, board certified in gerontological nursing with both a bachelors and a masters degree in nursing from New York University. Governing a staff of approximately 300, while improving on being a transformational leader, she garners current knowledge on aging services, which includes preparing for licensure in long-term care administration. 🌱



“I have learned through Leadership AAHSA, not only to self reflect, but to embrace the perspective of others and the knowledge that diversity influences innovation.”

Priscilla Haynes



## Promoting Cultural Competence In Aging Communities

My project will promote cultural competence in aging communities by intentionally enabling effective cross-cultural situations in the communities. This project will empower our communities to embrace diversity by examining policies, practices and behaviors that esteem differences, equity and fairness — including cultural-competence training. This will advance our organization's mission of "providing quality housing in caring communities."

## Leadership Influences

My project has evolved with the participation of my mentors and peers. I have established partnerships with other partners in the industry. I have developed many professional relationships through this process. Trusted colleagues who have been around for many years have always been there to support me and encourage me in my personal leadership development.

## Turning Points

The challenge for me was being able to coordinate key individuals'

schedules for meetings on this project, which put me in a holding pattern. When I was able to meet with my peers, they were engaged and ready to support this project. However, having everyone see my project as a priority for the organization was also challenging. When people are not visionary or are unable to view things outside the box, it's hard to get their follow-through, so I used motivational techniques to show them why this project was in their best interest.

## Moving Forward

I hope this project will spread fact-centered approaches to inclusion of people of all racial, ethnic and religious backgrounds. Regardless of your ethnic/racial/cultural background, the community where you live should have a culturally-competent staff and welcoming residents who embrace differences.

## Key Learning

I have learned so much in this year with Leadership AAHSA. I have not only become a better leader, but I have also become a better person. I am able to step back and take a view of things from the balcony, ask softball questions, avoid judging, and be open to all the possibilities. I've discovered that leadership

means to influence others to your desires and passions for the mission that we serve. I can lead from the back of the bus, when necessary. I now am able to empower others on my team to be leaders in this field.

### Bio Summary

Priscilla has served as an operations manager for Christian Church Homes for 10 years; her portfolio consists of eight senior

housing communities within the San Francisco Bay Area. Prior to her appointment as operations manager, she worked at Sojourner Truth Manor Senior Housing Complex for 15 years as the administrator obtaining certifications in COS, CMM, CHM, TIP and Fair Housing and 504 Compliance. She has been attending Merritt College where she currently has 102 undergraduate credits. 🌱

“I have learned so much in this year with Leadership AAHSA. I have not only become a better leader, but I have also become a better person.”



Janelle Henderson



## Service Coordination: An Expedition of Collaboration, Empowerment and Innovation

This project has been a journey of understanding, compromise and education for everyone. Our team of service coordinators (PVM and Hannan House) has come together in a collaborative effort to create a uniformed, system-wide program that provides quality service to seniors so that they can maintain their independence in our villages. My hope is that the program will continue to evolve and expand. Ideally, in the future, not only will it serve residents, but it will also assist seniors in the community in maintaining independence — and generate organization revenue.

## Leadership Influences

The relationships that I have developed during this process helped clarify the pathway and steps of this program. In talking with my mentors, I was able to learn from how and what they did to get their programs where our team envisions ours to be in the future. The relationships that I have generated have educated me on the importance of eyewitness

perspectives of historical data and how that data can be used to ignite future innovation.

## Turning Points

Dealing with the politics that comes along with collaborative relationships in the developing process can sometimes be difficult. The project is easy compared to navigating these land mines. The turning point came when I openly expressed my commitment as a leader to be transparent with all parties involved in the project. This challenged all parties to follow my example and bring their own concerns to the group forum for discussion and resolution.

## Moving Forward

In the months and years to come, I see this program expanding from eight villages to 24 villages — and being a fixed component of our PVM housing model. My hope is that, in the future, this program will expand to serve seniors in the community. I also hope government funding will be available for housing sites to facilitate this service. My dream is that the PVM program will serve as a premier model of service coordination for the senior housing field at large.

## Key Learning

When I started Leadership AAHSA, I was fairly new to my vice president position. The action learning process allowed me to reconnect with my social work discipline fundamentals in my new role. Finding the balance between the two has been a challenge, but a necessity in my development of the type of leader I want to be at this point in my life and in the future.

## Bio Summary

Janelle has been a practicing professional in aging services since 2002. She started her career with PVM as an intern in 2002 in the University of Michigan (UM) Social Work Program. After a few years away in senior center services and nursing home social services, Janelle returned as the PVM administrator of the Village of Bethany Manor. In 2008 she started her vice president role. Janelle's educational background includes a bachelor's in social work from Tuskegee University in Alabama, and a master's in social work in management of human services and gerontology from the University of Michigan. She is a Michigan-licensed master's social worker, a certified occupancy specialist and a management occupancy review specialist. 🌱



“The turning point came when I openly expressed my commitment as a leader to be transparent with all parties involved in the project.”

Marcia Hoffman



## Community Wellness-Centered Program

Our community has recognized the changing industry of long-term care and consumer preferences. The goal is to create an environment where hope and self-determination are at the core of services. We also aim to build a service-delivery program based on the principles of whole-person wellness. This will involve transformational leadership with a strong focus on person-centered care. We will challenge the misconception that aging equates with functional and mental decline. The focus of the programming will be to create an atmosphere that promotes personal growth through individualized wellness strategies.

## Leadership Influences

The leadership team needs to be supportive, accountable, motivated, trustworthy, creative and empowered to accomplish transformational change. Partnering with the residents as we develop programs demonstrates the organization's commitment to quality of life and quality of service. Staff involvement in the planning and leadership of the community increases their level of dedication and commitment

toward the organization's goals. All of this builds a stronger sense of community. My own leadership competency has grown as I realized the importance of these relationships in working with a diverse set of stakeholders to achieve a common goal.

## Turning Points

An unforeseen delay with implementation afforded additional time for the planning and education process. This has facilitated a strong foundation for the program. This turning point has taught me the value of being patient and taking the time to lay the ground work, which in turn contributes to the future success of the program. Planning is the most important and often the most time-intensive step. We are often anxious to see results, and it is a very valuable lesson to be patient and flexible.

## Moving Forward

I hope the community can identify and implement best practices that will be shared across the organization. I would like to see the program result in an enhanced quality of life for the resident by creating opportunities to achieve total wellness through mind, body and spirit. The residents will be

involved in the decision-making process regarding programming at the community, which will provide avenues for spiritual and psycho-social expression. It is my hope that residents and staff will feel like they are an integral part of the overall plan.

## Key Learning

The Leaders in Residence shared their diverse experiences, struggles and successes. They have shown me the importance of confidence to follow my moral compass, which leads to my own “true north” of leadership. I have learned the value of sharing challenges with others and receiving honest feedback with unconditional acceptance. This provides strength and perspective to continue to lead others. One of the most valuable experiences of the program is the relationships I have formed with the Leadership AAHSA Fellows. I look forward to continuing this journey into the future of aging services together.

## Bio Summary

Marcia serves as the executive director of the Gettysburg Lutheran Retirement Village. She has a master’s degree in social work and is currently working toward the completion of her master’s in business administration. She is a licensed nursing home



administrator, certified aging services professional, and member of the Academy of Certified Social Workers. 🌱



“I would like to see the program result in an enhanced quality of life for the resident by creating opportunities to achieve total wellness through mind, body and spirit.”

Paul Jepson



## A Place to Call Home: Developing Memory Care Programs

ABHOW, as an expression of Christian mission, seeks to enhance the independence, well-being and security of older people through the provision of housing, health care and supportive services. Our memory care program, known as The Grove, provides a safe, dignified environment and unique program to enhance the quality of life for residents diagnosed with dementia. This project will enhance the ability of two continuing care retirement communities (CCRCs) to meet the needs of residents by creating a memory support level of care. The project includes the design and renovation of physical plants and development and implementation of an operational plan.

### Leadership Influences

Many of the team members involved in these projects, both peers and senior management, have worked together for more than a decade. This has afforded us the opportunity to continue to build relationships. We have been able to examine how to both improve professional relationships and the services being developed. Through a shared

commitment to furthering the quality and scope of services offered to residents, we have been able to develop and implement high-quality memory support programs. These relationships inspire and teach me and are an ongoing professional support; they have a strong influence on me.

### Turning Points

Implementing the shared goal of developing memory support programs involves reaching team consensus on decisions related to physical plant, programming, training, marketing, staffing and resident transition. A result of the teams' commitment is exposure to new developments and standards of practice in providing services to residents with dementia. I have gained further insight into such services through dialogue with team members, observation of unique and creative practices, and learning from their experiences. Feedback from other stakeholders — including board members, family members and residents — has also contributed to this process.

### Moving Forward

Providing this scope of service enables a CCRC to assist residents in maintaining their maximum level

of function, maintain and increase community occupancy, and broaden the continuum of service in a manner consistent with a fully developed CCRC. We anticipate the increased awareness of quality services to residents with dementia will result in improved services at all levels of care. Our corporate goal is to provide memory support programs in each ABHOW CCRC within the next four years.

### Key Learning

The Leadership AAHSA experience has reminded me of the importance of self-evaluation as I work individually and as a team leader to accomplish a common goal. Throughout the action

learning project, there have been opportunities for dialogue due to differences of opinion, which led to constructive resolution of conflict. I have had the opportunity to consciously integrate theories and ideas presented as part of the AASHA Leadership experience into real-life situations.

### Bio Summary

Paul has a master's degree in gerontology from the University of Southern California and has worked in the field of services to seniors for more than 20 years. Currently he is assistant vice president for care services and corporate ethics officer for American Baptist Homes of the West. 

“The Leadership AAHSA experience has reminded me of the importance of self-evaluation as I work individually and as a team leader to accomplish a common goal.”



Mark B. Lewis



## Embracing Culture Change By Way of Leadership Development

The transition to a person-centered care approach from traditional nursing home care is a continuous process — often referred to as a journey. At Traditions at Bath Road, we began our journey in 2006 and have seen our share of successes as well as setbacks. In order to truly provide care that is individualized, which will enrich the lives of our residents, a change in culture and mind-set within the community must come first. As a leader, I've found this mission of change has already provided many challenges. However, as we continue our journey, this experience will also foster my own development.

### Leadership Influences

The principles of culture change center on building relationships and developing trust within the organization. However, in the beginning stages of our person-centered care journey, this idea was lost. Unknowingly, my focus was less about inspiring change and empowering others around me, but rather, directing them to follow. After a few crucible moments, it became apparent that it was my

own leadership approach that was holding us back. I needed to let go and allow change to be created through the team's efforts. Our future success, like any organization's success, hinges on the development of trusting relationships and inspiring those around us.

### Turning Points

A critical turning point for me throughout this process was confronting the brutal fact that our journey into person-centered care had run off course. In the beginning, we focused more on external and environmental changes. This initially created a buzz of positivity, but it did not last. As we began to run out of gas, the true meaning of person-centered care was lost and so was the energy. I realized that, in order to truly proceed down this road, the culture of our facility must be the first focus of change. Most importantly, it must begin with my own transformation.

### Moving Forward

In the upcoming months and years ahead, I hope that this process of culture change — as well as my own personal development — will enhance the living environment of our residents and the work

satisfaction of our associates. Throughout this wonderful experience, I have gained a great deal of valuable knowledge and insight into what drives and sustains positive change within the team dynamic. As the project moves forward and I continue to put into practice the leadership skills that foster passionate and inspired associates, the opportunities will be endless for those that both live and work in our community.

### Key Learning

The Leadership AAHSA program has afforded me with many great learning experiences and has provided a foundation for my own development as a leader. From the site visits to the group discussions and book learning, I come away both humbled and inspired.

Clearly the most important take-away for me has been a better self awareness. This came about through self reflection and the great instruction we've been afforded in this program. As it was so brilliantly described in the book *True North*, by Bill George, "Leadership is a journey, not a destination. It is a marathon, not a sprint."

### Bio Summary

Mark is the administrator at Traditions at Bath Road, an affiliate of National Church Residences, in Cuyahoga Falls, Ohio, where he lives with his wife Amy and son Kellen. Mark holds a bachelor's degree in psychology from the University of Findlay and has worked in long-term care for the past 13 years. 🌱



“Our future success, like any organization’s success, hinges on the development of trusting relationships and inspiring those around us.”

Paul R. Loomans



## Local Community Education Series

The Beatitudes Campus is a continuing care retirement community (CCRC) that has served the north central and greater Phoenix area for almost 45 years, securing high levels of awareness and trust in the local area and beyond. A major redevelopment of our 22-acre campus provides an opportunity to increase our level of public engagement, and to strengthen our position as a vital community resource. My project, called First Wednesdays at the Beatitudes Campus, is an event series featuring local speakers on educational topics of diverse general interest like cooking, art and local Arizona history. The event will also serve as a great opportunity for hospitality. It can encourage community conversations over a great cup of coffee, and give a taste of the enjoyable lifestyle on our campus. An initial series of six monthly events is planned for fall 2009 into early 2010, and will be held at our newly constructed Town Plaza complex.

## Leadership Influences

Through organized meetings and happenstance conversations, I've benefitted from great input and feedback from individuals inside and outside the Beatitudes Campus. More than anything, these conversations have led me to prioritize and focus the project in its initial stage, with recognition that the project will have room to grow and evolve. Peggy Mullan, our CEO, provided key mentorship on this project, much like the support she has given me throughout this Leadership AAHSA adventure. It has amazed me that there is such a deep well of collaboration and support for leadership, and that it has been so easy to access.

## Turning Points

Through collaborations with Morrison Senior Dining, our dining services management partner, we were able to secure renowned chef Cary Neff as our first educator. This got the program off to a great start!

## Moving Forward

At one time, I was concerned that my project might not be big enough in scope. I now recognize that it opens many directions for expansion. This could include

men's and women's focus issues; greater involvement of assisted living and skilled nursing residents; educational programs for caregivers at other organizations; resident-driven and self-directed groups; webinar formats; field trips; and cross-cultural issues. Regardless of format, it's important that each organization act locally to engage and contribute to the cities, towns and neighborhoods we serve.

### Key Learning

It's a pleasure to work in the field of aging services, with a recognition that our changing demographics and social landscape will continually demand that we refine and recreate our services and ourselves. More than anything, this program has helped me recognize the power

and support of collaboration that is available to me. No challenge is too big when you don't have to address it alone. And as opportunities arise to help and support others in their leadership process, I'll jump in with both feet, knowing that I'll become a better leader in the process.

### Bio Summary

Paul came to aging services and the Beatitudes Campus about five years ago, after 20 years in corporate marketing and advertising — and has enjoyed the transition. He has an MBA in marketing from the University of Wisconsin, Madison. Paul's wife Tazmine is an architect with a love of affordable green design. His cats Reggie and Bamboo are aging gracefully. 🌱

“It has amazed me that there is such a deep well of collaboration and support for leadership, and that it has been so easy to access.”



Catherine Lopez



## Enhancing Person-Centered Care

Our nursing homes have been evolving and transforming resident care for the last several years. Our person-centered care journey continues to address the individual needs of our living communities. My project will focus on the implementation of consistent staffing assignments for all of our residents. Consistent staffing assignments are crucial to sustaining a culture of person-centered care. By assuring each resident receives the same care providers, we will endeavor to make our residents feel comforted and cared for in a consistent, familiar environment.

## Leadership Influences

I formed a working team composed of the directors of nursing, administrators, union officials and certified nursing aides to work collaboratively to develop the creative tracks for this project. Like a spoke on a wheel, I encouraged all members of the team to bring all of their ideas, challenges and feedback to the table. Each team member contributes a unique and important facet to this project. Ultimately, we are all bonded by

one common goal: to provide individual care to our residents. As a result, we hope to establish a well-rounded, consistent staffing assignment initiative. As a leader, I have learned to appreciate the spectrum of ideas, philosophies and perspectives each team member contributes.

## Turning Points

The Elant network includes eight campuses. Each campus has a distinct and different culture. A focused initiative of my project requires implementing uniformity on certain criteria. In working with the staff from each of our campuses, each facility responded differently to the criteria. In order to achieve consensus and buy-in with the project by all the team members, we needed to make adjustments to meet the unique needs of each facility.

## Moving Forward

I believe this initiative will make a real difference in the care we are able to provide to our residents. Several years ago, one of our facilities implemented consistent staffing assignments. Over the course of time, this facility has demonstrated superior clinical

outcomes. This facility has become the example of success in Elant's journey toward person-centered care. I believe we can achieve the same success across the entire Elant organization.

### Key Learning

The action learning process has allowed me to appreciate my interactions as a leader from several different viewpoints. Prior to engaging in the action learning process, I had been advocating, negotiating or compromising. The action learning process has taught me to be a better listener. I have gained a better understanding of the differences between listening and active listening — two distinctly different skills. I have learned that I must reach a real depth of listening in order to really understand the essence of the messages people are trying to convey to me. I have learned not to overreact when ideas or comments conflict with my inner compass, but to step back and really care about the intent of what people are trying to express. I am evolving into a calmer, and hopefully more receptive, leader.



### Bio Summary

Catherine serves as vice president of employee resources for Elant Inc. in the Hudson Valley region in New York. The chief negotiator for multiple union contracts in her system, she has 17 years of experience in human resources. Catherine and her husband are avid gardeners who best enjoy life with their son Christian and two Chihuahuas, Rocky and Chucky. 🌱



“Each team member contributes  
a unique and important facet  
to this project.”

Ben Mazzara



## The Implementation of Hospice In a Continuing Care Retirement Community

At Calder Woods there was a need to provide a service that was otherwise contracted to an outside agency — hospice. Repositioning our CCRC is transformational leadership, because it is crucial to our future success and survival as new competition moves into the area. This project is innovative and requires a new service and the creation of new processes while inspiring staff to a different vision of health care delivery. It has a direct link to the Leadership AAHSA core tenants of moral and ethical leadership. The team has developed a plan to change the programs, practices, services and physical plant to meet these standards as well as adhere to regulatory standards.

### Leadership Influences

Transformational leadership and the implementation of new programs can be effective only if you have a great team in place. This team needs to be supportive, accountable, innovative and empowering. It begins with leaders who are authentic and

transparent. I have the best team, which includes my mentors and supervisors, who have guided me through this process and supported me throughout my project. Their authentic feedback has allowed me to evaluate the project and my leadership intensely. There is a commitment to the success of this project from all levels, and this has given me encouragement.

### Turning Points

Delays with the implementation of this program at other facilities has allowed me deeper analysis of processes, systems and consulting. I have realized that I need to be the source for communicating and empowering visions — and conducting analysis and research on the project. This teaches the value of being patient and taking the time to lay the ground work, which contributes to the success of the program. Proper education early on is paramount for its success. New regulations are now requiring special certifications for the new program. The organization has invested significant financial resources into the new program and has invested in its staff. Good stewardship is essential.

## Moving Forward

Our goal is to complete implementation over the next six months. It is my hope that residents and their families will embrace this program. In addition to selecting a new team leader and staff for this program, there will need to be an ongoing training program for the services which are ongoing. The selection process includes experienced individuals. Recognizing the scope of work that needs to be accomplished, the advisory board will meet monthly over the next year. The group will seek to refine processes to meet the needs of the residents. Our hope is that this program will have the best reputation in the community. We hope to educate the community about hospice services. Listening to the needs of residents, families and the community is vital. This service will expand into the community. My hope is that this new program and service will add value and establish community relationships.

## Key Learning

Every aspect of Leadership AAHSA has influenced my learning experience with my action learning project. I have a greater skill of listening and asking softball questions than I did before Leadership AAHSA. I now have the ability to step back, listen and

observe. I have identified what was missing in my leadership skills. The relationships I have developed have been personally rewarding and professionally valuable. Leadership AAHSA has helped me follow my “true north” leadership. I am blessed to work for an organization that has invested money and time in supporting me through Leadership AAHSA. This benefit will help the organization and, most of all, the residents we serve!

## Bio Summary

Ben is executive director of Calder Woods Retirement Community, which is part of the Buckner Retirement Systems. Ben received his degree in health care administration from The University of Texas School of Allied Health. He is a licensed nursing facility administrator. Texas Governor Rick Perry appointed Ben to a second six-year term to the Nursing Facility Administrators Advisory Committee (NFAAC). He also serves on the board of directors of St. Dominic's Village in Houston, Texas. 🌱



Pamela K. McGrew



## Assessing Ongoing Progress On the Journey To Person-Centered Care

My action learning project will design a tool to determine our ongoing progress and the next action steps along the journey to person-centered care. Culture change and person-centered care are highly discussed issues at the forefront of long-term care. This process will provide an ongoing look at the journey to person-centered care, understanding that it is the process itself that makes a difference. This will benefit the individuals we serve by bringing person-centered care more in focus each day. It will result in residents' increased autonomy, maintenance of cognitive abilities, and greater involvement in the social community.

## Leadership Influences

The opportunities I have had to develop relationships, and discuss culture change and person-centered care, have definitely influenced the direction of my action learning project. Each individual — whether a staff member, resident or mentor — has a unique view of what person-centered care is and of how best to move toward true

culture change. The relationships with mentors, partners and stakeholders have helped me to define my goals. I have developed new connections with others who have participated at varying levels in the culture change process.

## Turning Points

There have been a number of turning points for me throughout this process. Initially, I was surprised by the difficulty I had in defining a project. Once it was defined, I was challenged to look closely at the routine processes we conduct every day. I then evaluated them based on culture change and person-centered care. The insight I received by thinking differently about routine actions made me more aware of the importance of person-centered care. I saw what a difference it can make in the daily lives of residents and staff.

## Moving Forward

I hope that my project will help individuals who are involved in long-term care services, regardless of their role, to be more aware of the importance of relationships with the individuals in their daily contact circles. This process will highlight the areas where we are focused on person-centered care and the areas

where there is room for growth. The impact on the field at large will be to further define and clarify what steps need to be taken to continue moving along the journey toward person-centered care each day.

## Key Learning

This project has given me the opportunity to practice many of the concepts focused on in our Leadership AAHSA class. Self reflection, building relationships, and the concept of a holding environment when change is occurring, have been foundational concepts in leadership. Each of these concepts has been highlighted as I have focused on my project. My growth as a leader will continue as I take time for self reflection, build relationships with others in the field and in our care, and provide an environment for others to accept and encourage change.

## Bio Summary

Pamela is executive director for Sears Methodist Retirement Systems Inc. She is a licensed master social worker and licensed nursing facility administrator. Pamela enjoys being actively involved in the community. She is married to Mike, and they have one son, Bradley, who is attending Abilene Christian University. 🌱





“The insight I received by thinking differently about routine actions made me more aware of the importance of person-centered care.”

Susan Murty



## Enriching Lives Through Positive Approaches In the Nursing Home

Too frequently, in a nursing home environment, residents suffering from dementia and/or mental illness present with behaviors that are disruptive, maladaptive and problematic. These residents are frequently referred to as behavior problems by the people they live with and by those who care for them. My project will aim to empower caregivers through education and problem solving. It will look at the many reasons behind these problematic behaviors and the best way to prevent and minimize any negative effects they have. This supports our mission through reducing the need for psychotropic medication administration by using a non-pharmacologic, person-centered, preference-based approach to care delivery.

## Leadership Influences

Throughout this process, I have benefited from partnerships and collaborations with stakeholders both within and outside of my organization. The consultation with our psychologist, Dr. Paul Nation, resulted in the implementation of

an educational series for all staff, improving their knowledge base on preventing problematic behavior. The relationships I developed with the primary caregivers have been the most beneficial to me as a leader. Clearly, they have the best information and ideas around care delivery. They should be empowered with enough autonomy to provide excellent care and improve the experiences shared between residents and staff within our community.

## Turning Points

A turning point was when I realized, although we were taking an interdisciplinary approach and spending a great deal of time care planning these issues, we were all too often not impacting the problem as we had intended to. We needed to better engage and empower direct caregivers and family members to help us assess the preferences, needs and desires of our residents. Doing this would give us the tools necessary to improve the quality of life for residents. Empowering staff is the key to improving the nursing home experience for all.

## Moving Forward

We plan to positively impact quality of life for all residents through closely paying attention to routines, preferences and meaningful activity. We will develop a Positive Experiences steering team to be composed of direct caregivers. We are looking to this group to guide our efforts in improving the experiences of our staff and residents through preventing problematic behavior. They will also help us as we strive to achieve a more resident-centered environment. Additionally, we plan to continue our education for all staff and intense case reviews for exceptionally problematic situations. We hope our program reframes our perception of resident behaviors.

## Key Learning

The Leadership AAHSA program, including the action learning project, has allowed me to learn from an

amazing group of Fellows. It has forced me to take a courageous look at my own leadership strengths and challenges. I have been exposed to a variety of theories, books, experiences and people that I now take with me in my tool box to be used at any time. Most importantly, I have learned that leaders do not have all the answers. It is much more important to have many questions and to build a diverse team of capable individuals who collectively can make a huge difference.

## Bio Summary

Sue is the associate administrator at St. Ann's Community in Rochester, N.Y. She has spent the last eight years as director of social work at St. Ann's and loves working with and learning from the residents. She is married and has three young boys to whom she hopes to pass along her passion for working with the elderly. 



“Empowering staff is the key  
to improving the nursing home  
experience for all.”

Dorothy Myles



## Adding to the Quality of Life for Seniors Through the Nursing Home Diversion Program (NHD)

Suncoast Hospice created its Elder Care Services Division to add value and quality of life to our community seniors before they get to the end of life. The Nursing Home Diversion Program (NHD) will provide a wide range of services to make it easier for seniors to get the care needed to live safely and independently in a community setting, such as their home or an assisted living facility. Suncoast is committed to quality living for our seniors, and what better way to show this than through implementation of the NHD program?

### Leadership Influences

My buddy from my Leadership AAHSA class said it best: “Leadership is a journey best taken with someone you trust.” I have been blessed to be surrounded with senior leadership that has a wealth of knowledge in this field of work. Two of my greatest influences and supporters for this project are my former executive vice president, Becky McDonald, and Pattye Sawyer, vice president

of community health programs. Though Becky has retired, she has left an open door to assist, support and influence the effort for implementation of the project. Pattye is always there to champion the cause on a day-to-day basis.

### Turning Points

I think the surprise for me was that my chief financial officer was interested and excited about the thought of us implementing the program within our hospice. I was also overjoyed by the overwhelming support of any staff that I may have solicited for assistance.

### Moving Forward

I see this project becoming an exciting addition to the continuum of care that Suncoast Hospice offers. I foresee this project being a benefit to our hospice with a great emphasis on patient care and family support.

### Key Learning

The site visits and interactions with the Leaders in Residence influenced my project. I was able to visit various locations across the country and see organizations that were well-managed and working to implement culture change. In

my case, the culture change would be through the services and the population that we will be targeting for service provision. It's really quite exciting, and I am looking forward to the future.

### Bio Summary

Dorothy serves as the director of elder care services. She has 10 years of experience in program development for seniors, multicultural communities and the underserved. She received her bachelor's degree in sociology from Mississippi Valley State University and her master's in public administration at Nova Southeastern University in Florida. 🌱





“I see this project becoming an exciting addition to the continuum of care that Suncoast Hospice offers.”

Leo T. Sanders



## Assess the Feasibility for a PACE Program at Christian Care Centers Inc.

Texas seniors need and deserve more care and supportive options that promote optimal aging in their home of choice. If asked, most seniors would prefer to age successfully in the comforts of their own home. In Texas, we have an abundance of skilled nursing beds and overtaxed home and community-based service programs that currently do not fulfill the needs of our aging population. My action learning project is to assess the feasibility of the Program of All Inclusive Care for the Elderly (PACE) for Christian Care Centers Inc. My hope is to give seniors options to safely age in the home of their choice.

## Leadership Influences

I am thankful to my mentor of many years, Phil Elmore, president and chief executive officer of Christian Care Centers Inc., for allowing me to see the development process from the 20,000-foot level. I am also grateful to Linda Morrison, chief operations officer, for keeping me on task with the details on the dance floor. I conducted extensive

research on the concept of PACE, but I was very unsure where to begin. My PACE network of colleagues was helpful in mapping out the process of developing PACE. Mapping with my PACE colleagues greatly influenced me and convinced me that my initial priority is to complete an organizational assessment and a market and feasibility analysis.

## Turning Points

There were many scheduling conflicts after initial discussions with my sponsor, mentor and PACE contacts. Therefore, throughout the project, I learned to be very flexible. I also adapted to using alternate communication methods, such as e-mail and telephone to dialogue. I was amazed how my colleagues, involved in PACE, were so willing to share information about PACE. It reaffirmed the importance of collective thinking, and affirmed the importance of building a diverse external network of professional colleagues.

## Moving Forward

PACE would be a wonderful addition to the ministry of Christian Care Centers Inc. I look forward to the opportunity to present PACE to our senior leadership and board

of directors, and the initiation of a market and feasibility analysis by the end of 2009. Texas seniors do not have enough care and supportive options that allow for optimal aging in the home of choice. The PACE program, in my opinion, could provide this opportunity to more Texas seniors.

### Key Learning

Leadership AAHSA affirmed that I am destined to continue my leadership journey into aging and support services. I am thankful for the many life and professional experiences I gained from my colleagues. They will continue to reshape my thoughts and attitude as I address challenges at the leadership level. I am thankful for the lessons and readings that affirmed how important and necessary it is to step back and think through your next move. They also affirmed how powerful and necessary a well-built external network is for each leader's toolbox.

### Bio Summary

Leo serves as the vice president of ancillary services for Christian Care Centers Inc., located in Mesquite, Texas. He is a student of leadership and change management, and passionate about innovations that successfully contribute to optimal aging for seniors of today and the future. 🌱





“Leadership AAHSA affirmed that I am destined to continue my leadership journey into aging and support services.”

Elizabeth Sassen



## Eliminating My Impossibilities SM

Simply put, this project is about culture change. We have developed a new operating theme, Eliminating my Impossibilities SM (EMI), and this will serve as the new foundation upon which new experiences for older adults and employees will be built. EMI implies that it's never impossible to dust off shelved priorities, revisit lifelong dreams, learn or do new things, meet new people, drop bad habits, or adopt good ones. Mather LifeWays' mission is to Create Ways to Age Well SM, and we are advancing our organization's mission by creating an environment where impossibilities can be shattered and personal transformations can occur.

## Leadership Influences

I volunteered myself to work on the university piece that would teach our employees how to work in new ways that support our new direction. In order to do so, I am taking a sabbatical from my role and now co-report to a vice president in another area. After nine years of being in the same area, this was a bold and scary move for me. However, it was necessary in order to effectively move the culture

change forward. The new reporting relationship has positively impacted me, and I find myself thinking in new, different and surprising ways that are key to this project.

## Turning Points

I was in the same role for so long that I was very confident about my work and its quality. I now have a job that needs to be invented and created. I approached the experience much like a tornado would drop from the sky! It shouldn't surprise me that not everyone has done cartwheels over some of the ideas I have put forth. I have realized that I need to establish trust and rapport before any real work can get done. This process needs time, and it's important to balance that with the time sensitivity of this project.

## Moving Forward

I hope in the months ahead I will begin to see some of the fruits of our labor. My desire is that employees begin to work and live in different ways — ways that show that they understand what it means to eliminate impossibilities for residents, customers and themselves. Years from now, I hope our entire team can look back on this process and be proud of how

far we have come. Lastly, I hope we can be a national model for taking the stereotypes of aging and senior living and turning them upside down and inside out!

### Key Learning

I often wonder, if I hadn't been involved in Leadership AAHSA, if I would have had the courage to volunteer myself for the work that I am doing. However, I have come to realize that if you don't take risks, you also risk not growing! The action learning process has really helped me understand myself better in terms of what positive attributes I bring to the table as a leader — and what areas need

further development. There is an ancient Greek aphorism, “know thyself.” This process, in the context of Leadership AAHSA, really helped me do just that.

### Bio Summary

Betsie's professional experience over the past 17 years includes adult day care program management, nursing supervision in a long-term care facility, and hospital senior membership and community health program management. She is currently an assistant vice president at Mather LifeWays and serves in a variety of roles from operations to staff development. 🌱

“I hope we can be a national model for taking the stereotypes of aging and senior living and turning them upside down and inside out!”



Holly S. Schade



## Being Good Neighbors: Transforming to a Person-Centered CCRC

The Good Neighbors program at Spring House Estates was developed, in part, to advance my organization's strategic plan of implementing culture change throughout the entire continuum of care. It was also formed to help break down the silos that exist among the various levels of care in a retirement community, so that residents' friendships can continue. Often when residents move into the skilled care center, they feel isolated from their friends/neighbors and feel overwhelmed by their new surroundings. The Good Neighbor program enables independent living residents to become a good neighbor to a resident in the skilled care center. The good neighbor initially welcomes the resident upon admission with a welcome bag, continues to visit the resident, and becomes the resident's advocate. The goals of the program are to foster strong relationships, cultivate friendships, enhance the resident's life experiences, break down the barriers among the various levels of care, and permeate loving-kindness within our community.

## Leadership Influences

I have been blessed with many individuals in my life who continuously nurture and challenge both my professional and personal growth. During this project, my relationships with residents, staff and families have been strengthened. I have learned from my mentor, and through this experience, to take more time to process and analyze situations, instead of feeling compelled to take immediate action on my own. Involving others can take more time, but it facilitates a greater sense of empowerment, accountability and ownership for them. As a leader, you do not need to have all of the answers. You need to actively listen, encourage and support others. By empowering the action team, the ideas that the team of staff and residents are sharing and creating have enhanced this project beyond my original expectations. A shared vision has an even more powerful impact on the lives of residents and staff, in fostering strong relationships, and in creating a true community.

## Turning Points

What surprised me the most was how cohesively the action team has worked together with a shared vision to create and implement this program, especially as the team consists of residents and staff. I was astonished to see those natural born leaders — that we all have in our organizations — rise to the occasion and take on leadership roles themselves. A crucible moment for me was in recognizing that it was alright to relinquish control. I then took on more of a supportive consultant role, empowering the team to make decisions and problem solve together. For transformational leadership to occur, I also learned how imperative it is to actively listen to individuals, the team and the stakeholders. I truly believe that it was because of this empowerment, and my relinquishing control to the team, that they were able to move quickly in successfully implementing this program.

## Moving Forward

The upcoming year will be one in which our team continues to work on further breaking down silos among the various levels of care in our community. We will also continue implementing person-centered care and services. For the Good Neighbor program, a more

formal training program will need to be developed for independent living residents who want to participate. We were also in the process of gathering data on resident satisfaction and perception of their quality of life before this program was initiated. Going forward, we will begin measuring the outcomes of this program. The goal would be to validate if it has enhanced residents' life experiences and fostered stronger relationships. Through ongoing education, active listening, team work, coaching and performance-improvement efforts, we will continue to build momentum to transform to a person-centered CCRC.

## Key Learning

My Leadership AAHSA fellowship has truly been transformational! I have learned to look at things through a wider lens and not to make hasty judgments. I have learned to be more open to other input and possibilities, and to get off the dance floor and be on the balcony. I was able to incorporate key theories from the books that we read and share these with my team, particularly emotional intelligence. My action learning project brought to life the leadership theories that I have learned and has allowed me to further develop my leadership abilities and realize



that my leadership is a work in progress. Leadership, similar to culture change, is a journey and not a destination in which I will continue to pursue my “true north.” Most important are the relationships that I have formed with the other Fellows. I know we’ll continue working together to enhance aging services.

### Bio Summary

Holly serves as executive director of Spring House Estates. She has more than 20 years of experience in health care and senior services. Holly joined ACTS Retirement-Life

Communities Inc. as a registered nurse in 1993 and has held various positions within the organization, including nursing supervisor, director of nursing, administrator of health services, and director of quality performance. She holds a master's degree in business administration from Eastern University, is a CARF-CCAC surveyor, and a graduate of the CASP program. 🌱

Jennifer Sinnott



## Embracing Wellness: Engaging Residents and Investing in Staff

My action learning project aims to embrace the concept of wellness across the NCPHS spectrum for both residents and staff. The various dimensions of wellness will be used as a thread to create greater cohesion between our communities. Our overall goal is to improve the lives of our residents and staff through education, support and group interaction. The increased integration and communication between our communities, emphasizing wellness, will advance NCPHS toward its vision of being an innovative leader in enhancing the quality of life of older persons and staff. It will also help distinctively set us apart within the multi-facility arena.

## Leadership Influences

With many ideas at the start of this process, I ultimately wanted the final outcome to be a good fit for our organization and to compliment our overall vision. The support and encouragement I've received, from our chief executive officer through our frontline staff, has greatly increased my confidence as a leader. It has given me the courage

to think beyond the immediate needs of the residents I serve on a daily basis. It has given me an opportunity to embrace a new way of caring for our residents and staff through a corporate-wide emphasis on wellness.

## Turning Points

The Leadership AAHSA experience came at a time when my work roles and responsibilities shifted. I have been challenged to focus, manage my time more effectively and actively set time aside for important projects. I have had to re-evaluate my own expectations and time frames for this project, as I have learned that change and innovation must be seen as a process. I also feel some additional leadership growth was needed on my part to fully embrace the idea and to be confident of my role within that process. The Leadership AAHSA experience has truly helped to strengthen my leadership foundation.

## Moving Forward

As our wellness focus continues to develop and becomes more fully embraced by all levels of our organization, it will increase the connections and cohesiveness between all of our communities

and departments. We will also see a genuine investment in the well-being of our residents and staff. As the program gains momentum, we will actively monitor and adjust the programming to meet the unique needs of each community and department. Our creativity and resourcefulness in advancing wellness will be evident at all levels of NCPHS. In addition, it will be easily replicable for organizations and communities of any size.

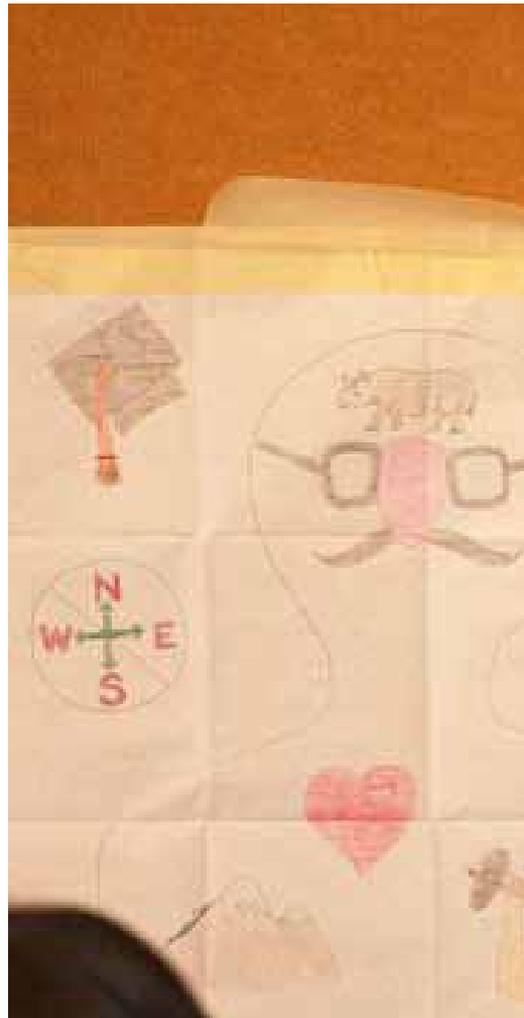
### Key Learning

The Leadership AAHSA experience has increased my confidence in my ability to bring about change and provide meaningful contributions in the work I do. It has given me an opportunity to generate excitement with other staff, and take an idea, created out of my own work in affordable housing, to the next level. My hope is that it will influence the overall health and well-being of many others. The process has exposed me to different players within our organization and given me an opportunity to fully develop the process of idea formation through implementation on a much larger scale.

### Bio Summary

Jennifer received her master's in social work from Boston College in 1997. For the past nine years she

has provided service coordination for low-income seniors in San Francisco with NCPHS. Jennifer recently began overseeing the San Francisco team of service coordinators. She serves as secretary for the Golden Gate Region of Aging Services of California. 🌱



“Our creativity and resourcefulness in advancing wellness will be evident at all levels of NCPHS.”



Michael J. Smith



## Modeling Change: Reducing Antipsychotic Medications in Dementia Care

Federal data from the Centers for Medicaid & Medicare Services show that, since 2005, Connecticut has consistently ranked in the top four states in the prevalence of antipsychotic medications dispensed to nursing home residents with no psychotic or related conditions. Many of these residents have dementia with behavioral disturbances. Use of these medications can be appropriate for someone with dementia, but not as an alternative to appropriate dementia care practices. By educating and modeling best practices in dementia care and informed consent protocols at multiple sites in Connecticut, we hope to demonstrate decreased use of antipsychotic drugs in the treatment of those with dementia.

## Leadership Influences

My focus has shifted from that of an innovator, creator and revolutionary leader within my own organization, to an educator, an evidence-based researcher, and an advocate for change beyond

my organization. The relationships that I have developed throughout this process with regulators, educators, other service providers, physicians, Alzheimer's advocates, and researchers have certainly influenced this shift. By acting collectively with other organizations, we are able to reach more people and have far more social impact than we could have through our own organization. This process has reinforced the importance of leveraging the needs, talents, strengths and interests of others.

## Turning Points

The action learning process highlighted ways that I could combine multiple personal and professional interests. On a professional level, I have always been motivated to help create an innovative and empathic model of dementia care, and to ensure that model's success. On a personal level, outside of work, I have always played an active role in public government and policy, but not in the area of health care. I had not considered how exciting it would be to combine this concern for shaping and influencing the common interest with those of my own organization and its mission.

## Moving Forward

We need to replicate best practices in the field of dementia care through more applied research projects. I hope that data collected over the next year will support a greater need for transformation in the practice of dementia care throughout the country. Decreasing overuse of antipsychotic drugs in the care of people with dementia should be a public priority. I further hope that this project will demonstrate significant savings to our federal and state funding programs and focus on the importance of addressing health care staffing and workplace training initiatives as public priorities.

## Key Learning

A key concept I had the chance to explore is that greatness, as measured in terms of social impact, has more to do with how nonprofits work outside their organizations

than how they manage their own internal operations. The action learning process was an excellent grounded opportunity to explore my own transformation with respect to this concept. It also served as a modeling opportunity for our organization to transform and to influence change in the practice of dementia care in other organizations.

## Bio Summary

Michael has served as executive director of the Alzheimer's Resource Center since 1996. Prior to joining the Resource Center, he was a manager with Ernst & Young LLP in the firm's Health Care Consulting Practice. He is a licensed nursing home administrator, has his degree in health care administration, and has taught graduate courses in health care policy at Yale University. 🌱



“By acting collectively with other organizations, we are able to reach more people and have far more social impact than we could have through our own organization.”

Donna M. Taylor



## Person-Centered Care – Guiding Actions

My action learning project is designed to provide a roadmap to our associates that will guide them on our journey toward person-centered care. The goal is to communicate and educate about the guiding actions that will support building relationships that enable each member of our staff to play a part in providing person-centered care. The guiding actions are 2nd Mile Service, Personal Accountability, Integrity and Teamwork.

## Leadership Influences

The team I am working with is made up of a diverse group of leaders in our organization. Each person brings a different viewpoint to the table because of our work backgrounds, areas of expertise and personal experiences. Our diverse perspectives and shared passion for serving elders have been critical in defining both person-centered care and the guiding actions. As a leader, I am both humbled and proud to be part of such a dynamic group. The relationships in this group inspire me to think outside the box and to envision a future for the elders we serve that is very different than our past and present.

## Turning Points

As we started talking about person-centered care, it amazed me how many definitions we had in the room. In the end, we defined person-centered care as “building relationships that protect, nurture and sustain our elders.” One important insight I was reminded of in this process was the importance of language. When we first started talking about providing guidance to our associates, we were using the word “values.” When we changed the word to guiding actions, it changed the picture. We were now talking about the actions required to move us toward our goal.

## Moving Forward

This project is definitely a journey, not a destination. Our leadership team did not get to our definition of person-centered care, our understanding of what will get us there, or any aspect of this process, overnight. I am anticipating this journey beginning slowly and gathering speed as we go. I am mindful of the hiking analogy where there is a strong person in the lead, and an equally strong person at the back of the group. That person serves as the sweep, gathering those who are taking the path at a

slower pace and making sure we leave no one behind.

## Key Learning

One of the most critical things I have learned through Leadership AAHSA is to appreciate and value other perspectives, even if they are directly opposite to my own. If you had asked me at the beginning of the Leadership AAHSA process, I would have described myself as open-minded and respectful of all opinions. It turns out I had some growth to do in this area. As I have developed my project, it would have been my natural tendency to hold tight to my own views and push them forward. Leadership AAHSA has shown me that I am a much more effective leader, our end

product is so much better, and the journey is so much more enjoyable, when I am open to and value the perspectives of others.

## Bio Summary

Donna is certified as a senior professional in human resources (SPHR) and a certified aging services professional (CASP). She served in various human resources and management roles prior to joining Arizona Baptist Retirement Centers in 2006 as the vice president of human resources. She was promoted in mid-2009 to the role of executive vice president, overseeing the areas of human resources, operations and marketing. 🌱



“One of the most critical things I have learned through Leadership AAHSA is to appreciate and value other perspectives, even if they are directly opposite to my own.”

Rick Taylor



## EMERGE: Shaping Tomorrow's Leaders Today

Questions of leadership cannot be left to chance. Whether under the banner of succession planning, or leadership development, the field of aging services must begin a process through which the next generation of leaders is not only identified but provided the opportunity to hone their skill set. Aging Services of California has a responsibility to help ensure that its members remain relevant, not just next week, but next year. To that end, the association will launch a comprehensive 12-month leadership development curriculum specifically designed to better prepare the next generation of leaders within its membership.

### Leadership Influences

This project has given me the opportunity to work with a number of my colleagues in new and creative ways. While we have collaborated in the past, this is really the first chance we have had to develop something from the ground up. As a result, I (not to mention the project) get the benefit of their collective experiences. Not only has this helped to make the

concept stronger, the process of bringing others to the proverbial table has created a shared sense of ownership. This will no doubt come in handy as we continue to develop the curriculum.

### Turning Points

There was a leadership change within my organization shortly after my fellowship began. My original sponsor (who had given me the green light to proceed with the project) decided to move on. So I had a choice to make. I could wait until the new chief executive officer was on board, or I could forge ahead and hope for the best. I opted for the latter. With the help of my colleagues, we were able to make a compelling case to the new chief executive officer, who understands the importance of leadership development. We are now preparing to launch the curriculum early next year.

### Moving Forward

It is difficult to know with any degree of certainty what the future might hold. That said, there are two things that I would like to see come out of this work. First and foremost, it is my hope that the curriculum helps to develop the next generation of

leaders within the field of aging services. We have an obligation to prepare our members for the future, and this project represents a tangible way to help make that happen. Secondly — and perhaps more importantly — it is my hope that this project will reaffirm the importance of diversity in leadership.

### Key Learning

This experience has helped me to better understand my unique leadership style. We all come at things with baggage — those life experiences that shape our outlook, attitude and behavior. If you're not careful, that baggage can sometimes get in the way and make it difficult to see things from different perspectives. Working on the development of the curriculum in partnership with my colleagues has been a great opportunity to put into practice some of the techniques we have picked up over the past year. I still have work to do, but I am a better leader today than I was yesterday.



### Bio Summary

Rick serves as the associate director of public policy for Aging Services of California. He is a veteran advocate for the development and preservation of affordable homes at both the state level and nationally. When not at the State Capitol, Rick enjoys life with his wife Erin. 🌱



“This experience has helped me to better understand my unique leadership style.”

Gregory D. Watson



## Linking Generations

This action learning project connects children, teenagers and young adults to the senior population within the community. The groups will participate in arts and crafts activities, games, reading, computer skill development and experience exchange. The goal of the project is to enhance the quality of life of our residents by offering a variety of different social settings, audiences and activities. This will allow for cognitive exercises and uncommon socialization — all while furthering Lifelink’s mission of “faith creating caring communities.”

## Leadership Influences

The relationships developed as part of the project have influenced its direction by broadening the scope of the activities the groups will participate in. They have also broadened the age range of the younger participants to include preschoolers and early college age students. Realizing the contributions of each age group, both younger and older, was fundamental in the development of the project’s model. My leadership was influenced by these relationships confirming the importance of a variety of inputs and of utilizing the resourcefulness of all willing participants.

## Turning Points

A challenge the project faces is engaging teenagers in the project. While initial meetings may go well, follow-up meetings have proven to be low. As initially hoped, the emotional state of the participating residents improved. However, a surprising turning point was the participation and reaction of the generally less-compassionate residents. The pleasant persona and genuine smiling faces these residents display has been amazing. It has reminded me of the importance of socialization for the mental well-being of the senior population.

## Moving Forward

I would like to introduce this model and its beneficial results to Lifelink as a whole. My hope is that our Children and Family Services Division and other housing colleagues will embrace the idea, as well as develop a presentation for our state conference. I think this project will have a significant impact on the aging services field at large, independent and affordable housing in particular. I believe senior housing professionals should provide more than decent, safe and sanitary housing. A resident’s quality of life should begin to improve the

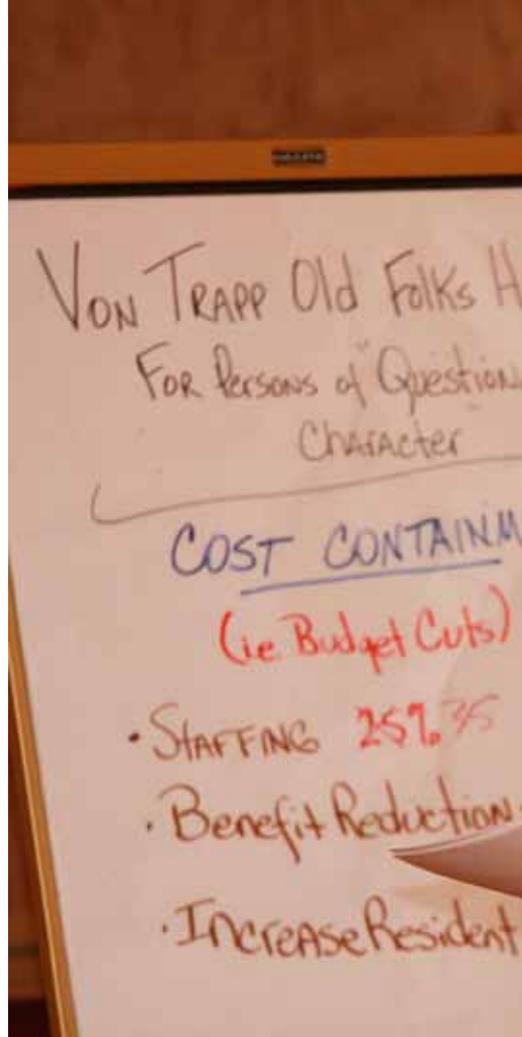
moment they move into a senior community. However, this will only happen through person-centered care.

## Key Learning

The project contributed to my growth as a leader by introducing me to different organizations and organizational leaders in the community. It gave me an opportunity to converse with others about our community, what we do, and the aging population in general. Leadership AAHSA has enhanced my ability to discuss the aging services field with those unaware of the issues we face. I have learned to look for resources and establish connections with persons willing to address those issues.

## Bio Summary

Gregory serves as an administrator for Greencastle of Woodlawn/ Lifelink Corporation. He is a licensed Illinois real estate broker, certified aging services professional, certified occupancy specialist, tax credit specialist, certified manager of housing, and candidate for the Certified Property Manager® designation. He holds a degree in accounting. 🌱





“A resident’s quality of life should begin to improve the moment they move into a senior community.”

Terri White



## Implementing Personal Assistance Services for Independent Living Residents

At PUMH, resident feedback and committee participation are important. Recent comments obtained from satisfaction surveys and master plan participation identified a gap in service options. The gap was for independent living residents who required some assistance with activities of daily living, but not the more extensive help requiring a move to assisted living. In my role to standardize programs and services for PUMH, this gap presented an opportunity for an action learning project. Providing our residents with an option that allows them to age in place in their independent living residence allows for more personal choice. This is important to the individual — and also critical for future marketing.

## Leadership Influences

I am fortunate that PUMH has been so supportive of my professional development. When I asked our CEO to sponsor me for Leadership AAHSA and mentioned the financial commitment, he responded without hesitation, “This is an investment

in your future, not an expense.” Consistent encouragement and empowerment provided by my sponsor and mentors has helped me develop into an effective leader. My work allows me the opportunity to interface with many stakeholders such as staff, residents, board members and external professionals. With the lessons learned and new tools added to my tool box through Leadership AAHSA, I plan to return the investment by helping other rising leaders within our organization.

## Turning Points

A turning point in developing this project was the realization that my time frame for implementation was contingent upon the state granting licensure to our organization to provide personal care services. New state regulations were promulgated in January, and it was several months (May) before an introductory meeting was held for applicants seeking licensure. The state will schedule a meeting for applicants to review elements of their program and to approve the organization’s policy and procedure manual. These time constraints, which are outside of my control, have challenged me to be patient and flexible, while remaining persistent.

## Moving Forward

My goal is to implement this program in our three Delaware CCRCs over the next six months. Today's residents, and those considering a move to our communities, want more lifestyle choices and an option to age in place while receiving needed support. This service will be valuable to them and valuable to us, minimizing premature moves into our assisted living areas and enhancing our marketing efforts. It is my hope that residents and families will embrace this program. Once stable, I envision expanding the program to include additional nursing services under a traditional home health care agency model.

## Key Learning

Leadership AAHSA has been a humbling, inspiring and rewarding experience. It has allowed me to work with professionals in other specialties and visit sites vastly different from my own. Through Leadership AAHSA, I have been exposed to a broader spectrum of the aging services field. In particular, conversations and learning with the

Leaders in Residence challenged me to step beyond my comfort zone and grow. The relationships I have developed have been personally and professionally valuable. The knowledge that others are willing to openly share their experiences and perspectives is a rich resource. Leadership is a journey, and I am confident that I will continue to develop my leadership skills and practice effective leadership wherever the path on my leadership journey takes me.

## Bio Summary

Terri serves as vice president of operations for Peninsula United Methodist Homes Inc. Terri has been with PUMH for 13 years and has held a variety of positions within the organization. She is a licensed nursing home administrator, a certified aging services professional, a CARF-CCAC surveyor, and serves on the AAHSA House of Delegates as well as the Delaware State Board of Nursing Home Examiners. Terri earned her Bachelor of Science degree from Ohio University. She and her husband John have a daughter Jennifer. 

“Leadership AAHSA has been a humbling, inspiring and rewarding experience.”



# Hosts

AAHSA extends deep gratitude to the following member organizations for offering the Leadership AAHSA Class of 2009 Fellows the opportunity to experience real-world transformational practices, and for providing meeting space and logistical support.

Cathedral Square Corporation  
Burlington, VT

Presbyterian Villages of Michigan  
Detroit, MI

Inglis House  
Philadelphia, PA

Trinity Senior Living Communities  
Fraser, MI

NewCourtland  
Philadelphia, PA

# 2009 Leaders in Residence

AAHSA thanks the following aging services leaders for sharing their professional and personal leadership stories through intimate conversations with the Leadership AAHSA Class of 2009, allowing Fellows to learn from their first-hand experiences.

Tom Akins  
Brewster Place  
Topeka, KS

Holly Argent-Tariq  
St. Mary's Episcopal Center Inc.  
New York, NY

Tim Ashe  
Cathedral Square Corporation  
South Burlington, VT

Barry Berman  
Chelsea Jewish Nursing Home  
Chelsea, MA

Cindy Bosley  
Masonic Pathways  
Alma, MI

Nellie Cole  
McKendree Village Inc.  
Hermitage, TN

Betsy Davis  
Consultant  
Burlington, VT

John Diffey  
The Kendal Corporation  
Kennett Square, PA

Molly Dugan  
Cathedral Square Corporation  
South Burlington, VT

Nancy Eldridge  
Cathedral Square Corporation  
South Burlington, VT

Anotoinette Ellis  
Michigan Department of Community  
Health  
Detroit, MI

Tom Evanson  
University of North Texas  
Denton, TX

Kim Fitzgerald  
Cathedral Square Corporation  
South Burlington, VT

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

David Gehm  
Lutheran Homes of Michigan  
Frankenmuth, MI

Jackie Harris  
Trinity Senior Living Communities  
Novi, MI

Adnan Hasan  
Grand Lake Garden Retirement  
Community  
Oakland, CA

Bill Healy  
Trinity Senior Living Communities  
Novi, MI

Cherese Holland  
Salem Lutheran Home  
Oakland, CA

Maggie Holmes  
Nursing Student  
Burlington, VT

Jen Hunter  
Cathedral Square Corporation  
South Burlington, VT

Henry Johnson  
Presbyterian Villages of Michigan  
Southfield, MI

Nancy King  
Senior Independence-OPRS  
Columbus, OH

Gayle Kvenvold  
Aging Services of Minnesota  
Saint Paul, MN

Kristi Lyon  
Cathedral Square Corporation  
South Burlington, VT

Win Marshall  
Christian Church Homes of  
Northern California  
Oakland, CA

Steve McAlilly  
Mississippi Methodist Senior  
Services  
Tupelo, MS

Patricia Mullins  
Isabelle Ridgway Care Center  
Columbus, OH

Roger Myers  
Presbyterian Villages of Michigan  
Chesterfield, MI

Steve Proctor  
Presbyterian Senior Living  
Dillsburg, PA

Ray Rabidoux  
Glacier Hills  
Ann Arbor, MI

Denise Rabidoux  
Evangelical Homes of Michigan  
Detroit, MI

Judah Ronch  
The Erickson School University of  
Maryland  
Baltimore, MD

Alisha Sanders  
Institute for the Future of Aging  
Services  
Washington, DC

Patricia Sprigg  
Carol Woods Retirement  
Community  
Chapel Hill, NC

# Faculty

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**

University of Maryland College Park  
College Park, MD



**Michele Holleran**

Holleran Consulting & DeArment Consulting  
Crested Butte, CO

# Staff



**Wendy Green**

Director, Leadership Development  
AAHSA  
Washington, DC



**Kirsten Jacobs**

Manager, Education Development  
AAHSA  
Washington, DC

# Coaches

AAHSA is blessed to offer the Fellows the rich background and expertise of the following 2009 coaches who regularly interface with Fellows and faculty/staff 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



## **Jerry Brown and Team**

*From left front row: Angela S. Dailey, Susan Murty, Sheri Filak-Taylor, Gregory D. Watson, Ben Mazzara, back row: Jerry Brown, Michael J. Smith, Elizabeth Donovan, Terri White*



**Kay Kallander**

American Baptist Homes of the West (ABHOW)  
Pleasanton, CA



**Kay Kallander and Team**

*From left front row: Holly S. Schade, Janelle Henderson, Joyce Dirkes Chavez, Mark B. Lewis, back row: Kay Kallander, Donna M. Taylor, Velma Haye, Michael Gordon*

# Coaches (cont.)



## **Kevin McFeely**

The Kenney  
Seattle, WA



## **Kevin McFeely and Team**

*From left:* Paul Loomans, Dorothy Myles, Elisabeth Sassen, Gregory Garrett, Jennifer Sinnott, Paul Jepson, Meredith Schell Fields, Kevin McFeely, Susan Murty, Sheila A. Brown



**Connie March**

Provena Senior Services  
Mokena, IL



**Connie March and Team**

*From left front row: Melissa M. Fortner, Lora Gomboc, Priscilla Haynes, Dennis G. Grindel, Leo T. Sanders, back row: Catherine Lopez, Pamela McGrew, Rick Taylor, Connie March*



# A Message from the Leadership AAHSA Alumni Network

Dear Class of 2009 Leadership AAHSA Fellows,



Congratulations! I hope that this past year with the Leadership AAHSA program has brought tremendous growth to you — both professionally AND personally. Your hard work, dedication to learning, and commitment to the field is a testament to the things AAHSA saw in your application for the program more than a year ago.

You visited some great places over the past twelve months — Philadelphia, Detroit, Washington, D.C., Burlington and finally Chicago. As you traveled, you built lifelong friendships and learned things that will benefit not only your organizations but your own personal development. If you're like the Fellows in the first two classes, the program has left you with one giant question: "What's next?"

Looking forward, it's my privilege to welcome you to the next chapter in your journey — your status as a member of the Leadership AAHSA Alumni Network. As a Leadership AAHSA alum, you'll have the opportunity to give



back to the field through participation with other alums on a number of committees and initiatives. Whether you're interested in shared learning or service, communications or fellowship, governance or fundraising, the network will afford you the chance to build on your involvement with the Leadership AAHSA program.

You'll be receiving more information about the network and ways you can contribute to its success. Its mission — advancing the field of aging services through leadership, service, innovation, shared learning and fellowship — is one I know you can help us achieve.

Again, welcome to the network. I look forward to our common work together.

Tom Akina, President  
Leadership AAHSA Alumni Network

PHOTOGRAPHY CREDITS:

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Sheila Brown

Rob Crites

Richard Doyle

Velma Haye

