

2011 LEADERSHIP ACADEMY

# TRANSFORMATION in action

LeadingAge<sup>\*\*</sup> leadership academy

# Leading Age LEADERSHIP ACADEMY



**CLASS** of **2011** 



### WELCOME TO THE **LEADERSHIP ACADEMY CLASS** of **2011**

A special congratulations to this fifth class of Fellows who now join the more than 150 Leadership Academy alumni from across the country. An important milestone and an impressive achievement!

The Fellows' participation in the rigorous, year-long Academy program speaks volumes about their understanding and practice of leadership and their sincere commitment to mobilize themselves and their peers on behalf of those we serve. Throughout the year the Fellows read and discussed various texts and met experienced leaders at all levels. They gained valuable insight into how to increase their own emotional intelligence so they can move their departments, organizations and the field forward. At the conclusion of their class year, they are poised to continue, together, to lead the field of aging through collaboration, creating partnerships and engaging their staff, residents and communities.

This publication catalogues and celebrates the culmination of a year's worth of engagement, exploration and transformation through the process of action learning. It serves as the public manifestation of the Fellows' learning and demonstrates that a new generation is committed to the most pressing challenges of our field.

I would like to personally thank this year's Fellows and their supporting organizations for contributing to the program's ongoing success. The Fellows' passion for their projects and the learning they acquired and imparted while in the program underscores their unique leadership gifts and potential. To the class of 2011 Fellows, you are a transformative group that I hope will continue to inspire, serve and advocate on behalf of those you serve and the field at large.

Sincerely,

William L. Minnix, Jr. LeadingAge President & CEO LeadingAge extends deep appreciation to the following individuals and organizations that have made donations to the Leadership Academy (formerly Leadership AAHSA) this year. Their contributions help to sustain the program and provide tuition assistance to future Fellows.

#### INDIVIDUALS

Tom Akins Raleigh, NC

Colleen Bloom Washington, DC

**Eric Boston Larry Minnix** Cleveland, TN

**Christina De La Torre** Los Angeles, CA

**DeAnn Escalante** Chapel Hill, NC

**Christy Kramer** Gaithersburg, MD

**Connie March** Mokena, IL

Washington, DC

**Kathy Mon** West Hartford, CT

**Margaret Mullan** Phoenix, AZ

**Roger Myers** Southfield, MI

**Aline Russotto** Canton, MA

**Lynn Szender** Lake Oswego, OR

**Patricia Tursi** New York, NY

#### **ORGANIZATIONS**

**American Baptist Homes of the West** Pleasanton, CA

**Christian Health Care** Center Wyckoff, NJ

**Episcopal Retirement** Homes

Cincinnati, OH

The Kendal Corporation Kennett Square, PA McGregor East Cleveland, OH

**Neilson Place** Bemidji, MN

Ohio Presbyterian **Retirement Services** Columbus, OH

**Pennswood Village** Newtown, PA

**Presbyterian SeniorCare** Oakmont, PA

**Presbyterian Villages** of Michigan Southfield, MI

St. Paul's Episcopal Home, Inc San Diego, CA

We also extend our sincere gratitude to the Alumni Network for funding a full tuition scholarship.

# TRANSFORMATION in action

The LEADERSHIP ACADEMY is rooted in three core principles:

Transformational Leadership

Leadership that elevates the aspirations and performance of organizations and individuals.

Innovation
Changes at every level that create new ways of providing value.

Person-directed Care

A focus on the well-being of the individual person we serve as well as the individual staff member who provides that service.



# TRANSFORMATION action

The year-long Leadership Academy curriculum includes a variety of challenging and engaging activities:

- Foundations of Leadership | Fellows develop a discipline of inquiry-driven leadership anchored in life-long individual learning and team growth.
- Graduate-Level Curriculum | Fellows immerse themselves in the science, theory and practice of leadership from a wide range of authors and experts.
- Diverse Network of Peers | Fellows build meaningful, lasting relationships that will provide guidance and support over a lifetime of leadership.
- Community Visits | Fellows witness inspiring, thoughtprovoking innovations shaping the future of aging services across the continuum of care.
- Leaders in Residence | Fellows participate in intimate conversations with seasoned leaders in our field about the leadership capacities that enable transformation.
- Self-Evaluation Exercises | Fellows engage in introspective reflections of personal leadership and learning styles that heighten self-awareness.
- Mentors and Facilitators | Fellows obtain the tools, experiences and connections needed to become change agents and inclusive leaders.
- Action Learning Project | Fellows actively influence change, support person-directed care and foster innovation in not-for-profit organizations.



# 2011 LEADERSHIP ACADEMY CLASS YEAR

The following is a snapshot of the 2011 class year:



CINDYHOGAN

# **Leading from the Mind** and Spirit

October 31 – November 4, 2010 Los Angeles, CA In conjunction with the 2010 AAHSA Annual Meeting & Exposition Site Visits: Motion Picture Television Fund, Wasserman Campus and TELACU's Tamayo Restaurant



**STACYTERRELL** 

# **Building Networks and Partnerships**

February 2 – 4, 2011
Boston, MA
Site Visits: Chelsea Jewish
Foundation's Leonard Florence
Center for Living and Peter Sanborn
Place Home Care and Day Services



**DAVIDTROST** 

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

April 9 – 13, 2011
Washington, DC
In conjunction with the Future of Aging
Services Conference



YOLANDAJOHNSON

**Sustaining** an **Ethic** of **Caring** and **Service** 

July 6 – 8, 2011
New York, NY
Site Visits: Selfhelp's Helen R.
Scheuer House/Selfhelp Weinberg
Apartments, Village Care of New York's
Rivington House and Elizabeth Seton
Pediatric Center



**ROGERMYERS** 

Passing it On – A Lifetime of Leadership

October 15 – 16, 2011 Washingon, DC In conjunction with the LeadingAge Annual Meeting & IAHSA Global Aging Conference

#### **ACTION LEARNING PROJECTS**



**JUDYBROWN** 

One powerful component of the Leadership Academy is an Action **Learning Project (ALP)** in which Fellows champion innovations to bring back to their organizations. Projects have ranged from developing a newer, more effective model of Alzheimer's care to improving employee performance. Through the ALP, Fellows gain more than an opportunity to develop innovations to benefit their organizations and the people they serve. Their ALPs also offer a chance to reflect individually and in groups, gaining insight through the wisdom of their peers and strengthening their skills at influencing change.

Fellows were asked to explore the following questions related to their Action Learning Projects and Leadership Academy experience:

- Making a Difference: How would you describe your project and how you expect it to unfold in the months/years ahead, including the impact you hope it will have on your organization's mission, the individuals you serve and the field?
- Leadership Influences: How have the relationships you are developing as part of your project (with mentors, partners, stakeholders, etc.) influenced its direction?
- Turning Points: What have been important turning points for you thus far, in your own learning, as you engage with the action learning process (you might consider a surprise, insight, setback or challenge)?
- Growth Through Learning: How has the action learning process and your overall experience in the Leadership Academy program (including the relationships you have developed as a result) contributed to your growth as a leader?

The Fellows' insights and observations are presented in the following pages...

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### **VANESSAANDREWS**

Child Life Specialist Elizabeth Seton Pediatric Center, New York, NY

#### **BIO SUMMARY**

Vanessa Andrews is a certified child life specialist and a board-certified and licensed art therapist. Her experience providing psychological services to critically ill children has been both educational and rewarding; she looks forward to using her expertise on behalf of adults in long-term care.

#### **Procedural Support Certificate Program**

#### **Making a Difference**

Currently, adults and seniors are unsupported and underprepared for medical procedures, resulting in anxiety, resistance and lasting fear. The Procedural Support Certificate Program addresses this gap in service and would train CNAs in specific preparation, support and distraction techniques (education, deep breathing, music, etc.) to help residents understand and cope with medical procedures. By providing this service, adults will be less anxious and better prepared and will maintain their independence. Additionally, procedures will require fewer staff and take less time, resulting in cost-efficient services.

#### **Leadership Influences**

Since many team members are experienced in pediatrics, we treasured input from those who have spent time in, and know the logistics of, a long-term care community for adults. By utilizing their input and learning about the needs of adults in long-term care, we were able to determine what professionals the training would best suit and who would benefit most from participation in the program. Without this guidance, it is likely that the wrong professionals would have been targeted, leading the program to be poorly implemented and thus unsuccessful.



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### **LINDABARKLEY**

Interim Administrator Neilson Place, Sanford Health of Northern Minnesota, Bemidji, MN

#### **BIO SUMMARY**

Linda Barkley is currently administrator of Neilson Place, Sanford Health of Northern Minnesota, for which she has worked for 27 years, much of that time in nursing leadership positions. Linda earned her bachelor's degree at the University of Phoenix and her long-term care administrator license at the University of Minnesota.

#### **Integration of Senior Campus Staff**

#### **Making a Difference**

Increasing the number of staff who are cross-trained to care for residents campus-wide affords increased continuity of care. Campus-wide training provides increased resident, family and staff satisfaction while creating a stronger sense of cohesion among team members and a sense of community throughout the campus. The number of staff cross-trained to work in more than one area will ultimately grow. Staff will have an improved sense of self-worth and a new energy to work within the independent, assisted living, memory care assisted living and long-term care areas of Neilson Place.

#### **Leadership Influences**

My mentor relationship comes in the form of a direct supervisor who strongly believes in person-centered care and has supported me in my endeavor for innovation in growing the campus. Stakeholder relationships continue to grow. I am ever amazed at the support offered from residents, families and staff in this project. As stated by a staff member, "The ability to jump in and work with residents anywhere on the campus gives me a sense of self-worth and makes me more valuable to the organization." Statements such as this make me believe the team is headed in the right direction.



I have a heightened awareness of the importance of practicing "presence." Being in the moment can be a challenge and at times I find my head is elsewhere. I need to pull myself back into the moment. By doing this, I am able to be an authentic listener and connect with the individual or team I am working with, thereby building a solid foundation for facing challenges and conflicts as we proceed with our work across the organization.

#### **Growth Through Learning**

This year has been one of personal transformation. The required reading, team presentations, site visits, Leaders in Residence Teas, conversations with Fellows and self-reflection exercises led by Judy Brown have been very inspirational. Meeting leaders from around the country who work in the same field, building relationships and learning from so many of them have been experiences I will not soon forget. Because of this process, I will continually work to improve myself and the senior campus team. I will be more disciplined and spend more time on the balcony looking out on the dance floor.



### **CHRISTOPHERBERNABE**

Chief of Operations TELACU Residential Management, Los Angeles, CA

#### **BIO SUMMARY**

Christopher Bernabe, son of Carmelita, husband of Christine and father of Ethan and Miya, is chief of operations at TELACU Residential Management. He is an Army combat veteran, an attorney and former police officer. His motto (borrowed from one of his favorite fictional heroes): "Everyone fights – No one quits!"

# Veterans Outreach – Serving Those Who've Served

#### **Making a Difference**

TELACU has a program, Veterans Upward Bound, that helps low-income veterans transition to college by providing free prep courses. I would like to see TELACU expand its services to include transitional or supportive housing for low-income and disabled veterans, particularly combat veterans. As a combat veteran myself, I know the key will lie in our outreach program, as many combat veterans are reticent about asking for, and receiving, help and often refuse a "hand-out." I hope the program will empower veterans to become self-sufficient and inspire them to "pay it forward" by helping their fellow veterans.

#### **Leadership Influences**

My boss and mentor, Jasmine Borrego, is behind me 100 percent and shares my desire to move this program forward. I am still in the exploratory phase but am confident that if I present a workable plan to Jasmine, she will go to bat with me (not for me) to David Lizarraga, president & CEO of TELACU, and his son, Michael Lizarraga, president & CEO of TELACU Industries, to leverage TELACU's influence and resources to bring my project to fruition.

As chief of operations, my duties have left me little time to devote to my project. I only recently set up appointments with the coordinator of our Veterans Upward Bound program to learn how the program goes about reaching out to veterans. Through Jasmine, I also obtained an appointment with the Housing Committee chairperson of the Los Angeles VA's Supported Housing Program. I'm excited to see how these meetings will go. I am equally excited to face whatever challenges arise.

#### **Growth Through Learning**

This program and the Action Learning Project have reminded me that, despite my extensive experience thus far as a leader, I still have much to learn. This is a good thing, for if I ever stop learning, I do so at considerable peril both personally and professionally. The bonds I have formed in this program, I hope, will stay with me for a lifetime. I sincerely hope I have given my peers and facilitators as much as they have given me.





### **SCOTTBUSHONG**

President/Executive Director Inverness Village, Asbury Communities, Tulsa, OK

#### **BIO SUMMARY**

Scott Bushong is currently the president/executive director for Inverness Village, a wellness and hospitality-based community in Tulsa, OK. Prior to his service at Inverness, he was a regional vice president for a faith-based senior-living organization in Illinois.

### The Effects of a Dynamic, Whole-Person Wellness Model that Focuses on Improving the Quality of Life of Both Residents and Associates and its Correlation to Life Purpose

#### **Making a Difference**

My Action Learning Project seeks to explore the transformative juxtaposition that can be created by developing a whole-person wellness culture that weaves resident and associate-based programming into a model that focuses on each person's strengths and helps them to create their masterpiece. This three-year initiative is designed to show the correlation between associate satisfaction, life purpose and senior-living outcomes through increased resident satisfaction. Focused on transformative principles that spotlight the whole person, this project is designed to look differently at the relationship between staff and residents.

#### **Leadership Influences**

A group of stakeholders and I have formed a *Lifestyle Team* subcommittee to begin developing an outcomes-based research model for this project. Stakeholders include two degreed wellness professionals, the Inverness Village director of human resources, the associate executive director, as well as a qualified team of three to assist in coordinating the programming, documentation and follow-up. The stakeholders involved in this project have pushed me to

extend my project and introduce new components for measurement that I previously lacked the ability to conceptualize.

#### **Turning Points**

The primary turning point for me in formulating this project stemmed from the confidence I developed through the Leadership Academy. I have found myself more inquisitive and am pushing my boundaries and comfort zones in terms of how I am learning. The project has helped me to focus on learning as a perpetual process versus an event in time. This will help guide me in more effectively developing my project while also expanding my leadership journey.

#### **Growth Through Learning**

The Leadership Academy has forced me to examine my beliefs, relationships and effectiveness. The concept of moving from leadership to transformational leadership is one that I have always strived for; the Academy has given me the tools to help realize this goal. I have learned about the importance of service, and that effective leadership study challenges you to serve others in a way that moves beyond mentorship and support.





# **JANELLECHADWICK**

Administrator

Provena St. Anne Center/Provena Life Connections, Rockford, IL

#### **BIO SUMMARY**

Janelle Chadwick is the administrator for Provena St. Anne Center in Rockford, IL. She has been with Provena Life Connections for ten years. She began working in long-term care in 1991 as a respiratory therapist on a long-term ventilator unit.

#### **Readmission Reduction**

#### **Making a Difference**

The purpose of my Action Learning Project is to address an issue within my ministry, my organization and the aging-services field. Hospital readmissions negatively impact the resident/patient and will soon affect both acute care and post acute care providers. Through the action learning process, I intend to increase the clinical skills and confidence of the nursing staff, enhance medical oversight through the use of physicians and nurse practitioners, improve overall quality and, ultimately, prevent unnecessary hospital readmissions.

#### **Leadership Influences**

Relationships with stakeholders have greatly influenced the direction of my project. Through communication, education and data analysis with the stakeholders, an action plan was identified. While this plan has changed multiple times, achieving our outcome has been and will continue to be our focus. Collaboration has been an essential component of this project. I have learned the benefit of community resources and the knowledge they can bring to this endeavor.



There have been multiple surprises and challenges during my action learning journey. My initial vision has grown as a result of learning. The more I learned from the stakeholders, the greater the vision became. While we have encountered barriers along the way, collectively we have found ways to work around them. Because of the attributes of my team and stakeholders, the obstacles have not obscured our vision or our determination to achieve our goal.

#### **Growth Through Learning**

My Action Learning Project and my entire experience in the Leadership Academy have greatly contributed to my growth as a leader. By letting the experience "in" I have been able to participate fully and allow the learning process to take over. My confidence in my leadership skills has been strengthened. I am thankful that I had this opportunity, and I have pride in the work that all of the Fellows have achieved and will continue to achieve in years to come.



## **THOMASDOROUGH**

Executive Director
The Terraces of Phoenix/ABHOW, Phoenix, AZ

#### **BIO SUMMARY**

Thomas Dorough has been executive director of The Terraces of Phoenix since 2008. He holds a B.S. in hotel and restaurant management from Northern Arizona University. Tom is an 18-year veteran hotelier and accomplished leader in hospitality services. He is currently a LeadingAge Arizona board member and is a CASP graduate.

# Milestone Service Recognition Program ValueU

#### **Making a Difference**

The objective of ValueU is to develop a consistent organization-wide solution for service recognition that inspires and creates employee engagement. The reward and recognition program will include major service anniversaries and significant team member life events. It incorporates the recognition events anticipated in the ABHOW Advantage program, a hospitality program currently under development. With a potential shortage of skilled workers looming as the baby boom generation nears retirement, it will be vital to retain quality employees. Creating a culture of recognition will build a positive work environment, motivate high performance, increase morale and retain talent.

#### **Leadership Influences**

Working with a cross-disciplinary team from ABHOW CCRCs, affordable housing and our home office gave me the opportunity to work closely with many organizational leaders. Building a strong relationship with this diverse team allowed the project to be richer in depth. I appreciated the support of my mentors, who reminded me of the power of having confidantes to talk freely with and taking time to reflect. This has broadened my vision and allowed me to discover possibilities beyond the initial scope of the project.

Due to the vast distances between team member locations, much of the project's work has been conducted by conference calls. Since most people, including me, are not auditory learners, I wrestled with forming a mental image of some conceptual ideas. I discovered just how essential clear, concise communication is to the success of the team and project. Presenting my own thoughts and ideas as clearly as possible and listening carefully have proved necessary to detect team members' emotions and the pulse of progress.

#### **Growth Through Learning**

Participating in the Leadership Academy encouraged me to seek deeper levels of learning. Through the practice of self-reflection, I have gained a better understanding of my leadership strengths and weaknesses. I have a new network of friends now available to me (and I to them) to brainstorm fresh ways to handle the problems we each encounter, even though the focus of our day-to-day work may differ. I emerge from the Academy a stronger and more confidant leader.





### **DEBORAHENTY**

Chief Operating Officer and Administrator Eliza Bryant Village, Cleveland, OH

#### **BIO SUMMARY**

Deborah Enty became the COO and administrator at Eliza Bryant Village after ten years of serving as the chief financial officer. She completed her bachelor's and master's degrees in business administration and obtained her administrator license in 2007. She is responsible for the 175 residents of the long-term care section of Eliza Bryant Village.

#### **On-Site Renal Dialysis Center**

#### **Making a Difference**

African Americans constitute 29 percent of all patients treated for kidney failure, yet represent only 14 percent of the U.S. population. Building a renal dialysis center on the Eliza Bryant Village campus would serve a critical community need and expand the organization's mission of providing quality service and outreach programs. The need for dialysis services has become even greater in the past ten years due to more seniors being diagnosed with diabetes and hypertension, the most common causes of chronic kidney disease. Our vision is to provide dialysis services not only for our residents but for those in the surrounding community.

#### **Leadership Influences**

The president and CEO has been an influential mentor for me. He has offered feedback and encouragement on a leadership level that has allowed me to envision building a dialysis center. Also, I have spent more time working with the board of trustees, each of whom has a different area of expertise. This has exposed me to nurturing partnerships, construction processes, legal documentation and innovation. As an evolving leader, I have learned to appreciate the spectrum of ideas and perspectives each person has to offer.





### **CHRISTOPHERFERRERI**

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

#### **BIO SUMMARY**

Christopher Ferreri is vice president for administration at Parker Jewish Institute for Health Care and Rehabilitation in New Hyde Park, NY. Employed at Parker for more than ten years, he has responsibility for several operating areas and the ongoing modernization and renovation of the community.

#### **Parker Connections**

#### **Making a Difference**

My project is called "Parker Connections" and is an activities-based project that connects residents, or groups of residents, with Parker's managers and executives and aligns their interests into an activities program. Managers volunteer their time to assist the recreation department in resident programming. The goals of this project are to increase resident activities and foster positive interactions between management staff and our residents. I believe the program will strengthen the participating staff's sense of purpose within the organization.

#### **Leadership Influences**

The relationships that are built between staff and residents are the strength and success of Parker Connections. Watching unique relationships develop between management, staff and residents has had a profound effect on me as a leader. Creating a new level of social interaction on a regular basis fortifies our commitment to our residents and their families. Because of these interactions, I have a deeper appreciation for what the organization does every day. I expect the program to further enhance relationships between management and line staff as they work side by side with residents.



As a member of the executive team, I wanted to ensure that staff volunteered to participate in this program. I was overwhelmed by the number who volunteered. Although the program is in its infancy, there is a genuine excitement to spend quality time with the residents. As is the case in most of our work environments, our staff is extremely busy. Every day presents new challenges; the struggle is to keep the momentum and the interest from waning.

#### **Growth Through Learning**

As the Parker Connections program grows, I envision an environment in which all employees can spend quality time building relationships and learning from our residents. The action learning process has given me a clearer understanding of my purpose and role as a leader in my organization. The Leadership Academy has helped me develop a greater perspective on the issues our field encounters regularly and has equipped me with practical tools to solve problems. I hope that my example provides an opportunity for others to build relationships throughout the organization and foster a more dynamic community.



### **MORGANGABLE**

HCBS and Health Legislative Representative LeadingAge, Washington, DC

#### **BIO SUMMARY**

Morgan Gable is the HCBS and health legislative representative at LeadingAge and advocates for home and community-based services and health issues on Capitol Hill. With a background in geriatric social work, Morgan has put her lifelong passion of helping older adults into action, and hopes to continue to impact the aging-services field throughout her career.

#### **Transformative Advocacy**

#### **Making a Difference**

My Action Learning Project seeks to transform the way we advocate on behalf of our members. Often, our advocacy work has relied on focusing on the various pros and cons of legislation. By shifting the focus to telling the story of our members and how certain issues and legislation will affect them, I believe I can be more effective in educating members of Congress and congressional staff. By telling our members' stories, I am helping advance the mission of LeadingAge and our members.

#### **Leadership Influences**

Through my experiences in the Leadership Academy, I have learned the true mission of LeadingAge. Prior to this experience, I felt somewhat disconnected from our members. By interacting with and learning from the other Fellows, I am better equipped to represent them on Capitol Hill. Since I now truly understand their story, I can better explain it so that decisions made in Washington are made with real life issues in mind.

So far, I am surprised by how difficult instituting a change like this can be. With the current political climate and frantic pace on Capitol Hill, I struggle with finding time to reach out to members before meetings. This lack of time has been a significant challenge, but I believe that by starting small and integrating this new way of doing business into my everyday work, I will be able to be successful as I continue to work on behalf of our members.

#### **Growth Through Learning**

The action learning process has encouraged me to think differently and to develop a new perspective on my work. The overall Academy experience has helped me more than I had ever imagined possible. I have developed much more confidence in my interactions with congressional staffers and my co-workers. I feel so much better equipped to do my job and to advance in my career as a direct result of this program.



### **CLAIREHALTON**

Corporate Director of Human Resources ACTS Retirement-Life Communities, Inc., West Point, PA

#### **BIO SUMMARY**

Claire Halton has served ACTS Retirement-Life Communities, Inc., for 18 years and the field for more than 30 years. As corporate director of human resources, she provides direction for human resources programs, employment, employee relations, benefits, training and compliance. Claire holds bachelor's and master's degrees in human resources.

# A Journey to Becoming an Employer of Choice

#### **Making a Difference**

Providing security and peace of mind to residents is the foundation of the ACTS Retirement-Life Communities, Inc., mission statement. To accomplish this, the organization has a commitment to providing a work environment that fosters a "Culture of Loving-Kindness" where applicants aspire to work and employees want to stay. I do not characterize my Action Learning Project as a project, but rather a long-term strategic initiative that will continually explore best practices and initiate change to meet the needs of an evolving workforce.

#### **Leadership Influences**

I have always wanted to cultivate relationships, which is one of the reasons I love the human resources field. Now more than ever, I understand the importance of building and sustaining relationships. The "Great Place to Work Committee," consisting of front line and senior management, was formed with the objective of researching initiatives to meet the needs of our employees and enhance the work environment. This experience has provided me the opportunity to collaborate and work with leaders throughout my and other organizations, and to raise my leadership skills to another level.



A crucible moment occurred for me when a co-worker who is an alum of the Academy advised me to "stretch myself" in pursuit of my Action Learning Project. This motivated me to begin establishing relationships with leaders outside the organization to help formulate goals for my project and the committee. In addition, we began engaging employees more frequently in various forums throughout the organization to foster employee engagement and commitment. Engaged employees provide a higher level of service, therefore providing the security and peace of mind promised in our mission statement to those we serve.

#### **Growth Through Learning**

The greatest benefits of participating in the Academy are the relationships and support felt among the participants in my team, as well as from the entire class. The 2011 Leadership Academy Fellows come from across the country, from different organizations, and hold many different positions. At first, some of their titles may have been intimidating; however, from our first meeting, I felt an instant camaraderie and comfort. This reinforced for me that one's title should not create boundaries, and regardless of a person's title, we can all learn from one another.



# **JANETHERRON**

Regional Vice President of Operations Westminster Communities of Florida, Bradenton, FL

#### **BIO SUMMARY**

Janet Herron is regional vice president of operations for Westminster Communities of Florida. She has operational oversight for five continuing care retirement communities in St. Petersburg and Bradenton. Janet has a master's degree from the University of North Texas and has worked in CCRC leadership roles for 18 years.

# **Enhancing Community Wellness Through Lifelong Learning**

#### **Making a Difference**

"Creating and preserving excellent communities that promote wellness" is part of the mission of Westminster Communities of Florida. A major renovation of a dated building into a modern, state-of-the-art Center for Lifelong Learning at a St. Petersburg CCRC led to my project goal, which has been to lead the vision and planning process for lifelong learning opportunities to enhance this community's wellness program. Going forward, residents' views about lifelong learning will require quality, sophisticated programs that challenge our organization as well as the field to be resourceful and innovative in meeting the expectations of the individuals we serve.

#### **Leadership Influences**

Leading the vision and planning process for this project has given me the opportunity to work with several groups in new and creative ways. A Lifelong Learning Committee, composed of residents and staff, is developing program ideas based on their interests and life experiences. Partnerships with neighborhood, educational and civic organizations are being established to use the new lifelong learning center for programs and events that will benefit our residents and the larger community. Involving many stakeholders in this process has influenced my leadership in helping to create ownership and excitement for the program's success.

A turning point through the action learning process was when I used varied leadership styles to build relationships, develop commitment and move others toward a shared vision. Initially, the idea of a Center for Lifelong Learning was difficult for residents and staff to envision in this CCRC. Leading a change process that requires others to let go of long-established ways of doing things and embrace new possibilities has allowed me to hone my skills in different leadership approaches. Collectively, I believe this has encouraged greater collaboration for creating lifelong learning programs in this community.

#### **Growth Through Learning**

The experiences of the past year in the Leadership Academy have affirmed my sense of purpose and passion for my work in the field of aging services. Through developing meaningful relationships with other Fellows, gaining knowledge and insights from highly accomplished Leaders in Residence, seeing innovative and transformational best practices during site visits, and widening my view of leadership through reading and discussion, I have grown as a leader. This entire journey, along with my Action Learning Project, has inspired me to continue to strive to be a visionary leader for my organization.





# **CINDYHOGAN**

Executive Director, Research and Strategy, Christian Living Communities Corporate Office, Greenwood Village, CO

#### **BIO SUMMARY**

Cindy Hogan is executive director of research and strategy for Christian Living Communities in Denver, CO. She has served the senior care field for more than 25 years as an executive and consultant. Her consulting business focused on executive and organizational coaching and planning for individuals and teams experiencing change.

# Transforming Organizational Strategy With Scenario Planning

#### **Making a Difference**

In 2010, our Board Strategic Directions Committee was at a planning stalemate. The plan for the future no longer fit the realities of economic, social and industry changes in our community. I began to guide the committee through a scenario planning process to broaden and sharpen our thinking for the future. Four future scenario stories have been created, and new pathways for program development will come next. Our growth plan as a result of scenario planning will be more responsive to the consumer; the goal is to create innovative, legacy programs that change aging services.

#### **Leadership Influences**

The opportunity to facilitate planning for the organization allowed me greater access and influence with chief executives and the board. This led to the creation of a new position on research and strategy to which I was then promoted. I also reached out to others in the senior care field and leaders at LeadingAge who have led and experienced scenario planning. Several of the Academy Fellows have provided assistance in sharing their scenario planning expertise. This collaborative effort of "experts" has helped us avoid missteps and bring excitement back to planning.

The Leadership Academy curriculum and experiences prompted me to "own" my senior industry knowledge and planning expertise, and gave me the confidence to speak clearly and confidently to key decision makers in the organization. The key turning point for me came when designing the future no longer became a sideline to my operations role and became my full-time contribution. The shift from operating and managing a team to coordinating the "think tank" is an adventure of courage and commitment. I am humbled and challenged.

#### **Growth Through Learning**

I entered the Academy with a background in leadership study and years of operational experience. I was seeking a leadership and professional network upgrade. What I got was a jumpstart, starting with the LeadingAge staff's excellent facilitation, the gift of learning from thought leaders in our field and finally, support from my peer Fellows, who have become teachers, guides and friends. Designing the depth of change I am proposing in my project requires well-thought-out actions that have come from numerous conversations with the experts around me. I have grown into a courageous and outspoken leader.





# YOLANDAJOHNSON

Executive Director, Glen Meadows Retirement Community of Presbyterian Senior Living, Glen Arm, MD

#### **BIO SUMMARY**

Yolanda Johnson has served the aging-services field for 18 years. She is the executive director at Glen Meadows Retirement Community. She has an A.A. in nursing, a B.S. in business management and an M.B.A. Yolanda is a registered nurse and a licensed nursing home administrator.

# Preparing Emerging Leaders for the Future of Aging Services

#### **Making a Difference**

The goal of my Action Learning Project is to collaborate with students at historically black colleges and universities to build a culture of inclusion and diversity in aging services by providing learning experiences designed to encourage and engage emerging minority leaders to enter the field. Transformational organizations are beginning to take a deliberate approach to ensure that emerging leaders have the resources, skills and opportunities to lead the field with excellence. To that end, Presbyterian Senior Living has embraced this concept and has committed to the implementation of this project.

#### **Leadership Influences**

Developing an effective support team early in the process of this project's inception was paramount. The support team includes corporate leadership support and board member engagement. Further involvement with the local educational community has led to the introduction of the concept to the Morgan State University dean of the school of business, who is committed to collaborating in this effort.





### **MIKELOGAN**

Executive Director
University Place, West Lafayette, IN

#### **BIO SUMMARY**

Mike Logan completed his eleventh year in the CCRC ministry as an executive director. He currently writes a faith-based leadership blog, faithbasedleadership.wordpress.com. Most recently, he published an article in the Journal of Active Aging entitled "Engaging University Aging Research in a Continuing Care Retirement Community."

# University Place and Purdue University Balance Inititiative: Using New Technology to Enhance Balance and Mobility

#### **Making a Difference**

The University Place and Purdue University Balance Initiative fosters cooperation and interaction between our continuing care retirement community and Purdue University for the benefit of both organizations. It also seeks to enhance educational opportunities for residents, university students and faculty; increase intergenerational exposure and activities; and provide research opportunities for university students and faculty. The initiative will examine the effect of balance training on the mobility and postural control of older adults and provide proactive solutions to age and disease-related loss of balance, encouraging residents to help themselves with the support and guidance of experts.

#### **Leadership Influences**

This initiative involves collaboration between two large institutions, a CCRC and a university. The CCRC has provided space and shared in equipment costs for the research and education. Purdue University has provided resources for two faculty members and graduate students to conduct research and carry out the education. This team includes experts in balance, mobility and training.

Residents who participated in our program exhibited improved balance and mobility. These improvements most likely reduced their risk of suffering a debilitating fall. For example, residents improved their gait speed, step length and step width during walking. They also improved in their ability to step over obstacles and reported improved ability to recover after tripping. Residents enjoyed the interaction with students, and the students learned about research involving older adults and the benefits of balance intervention. Students also became more confident in their ability to enhance balance in older adults through progressive intervention.

#### **Growth Through Learning**

The formal affiliation between University Place and Purdue University establishes an innovative aging research partnership between a CCRC and the university. Through aging-science research, not-for-profit senior adult providers can advance the field of aging services, develop new leaders and contribute to aging science by collaborating with an institution of higher learning.





### **MIKELUCAS**

Chief Operating Officer Glenmoor, St. Augustine, FL

#### **BIO SUMMARY**

Mike is the chief operating officer of Glenmoor, a CCRC located in St. Augustine, FL. He has been with the organization for almost ten years and believes it's the best place ever to be in his career.

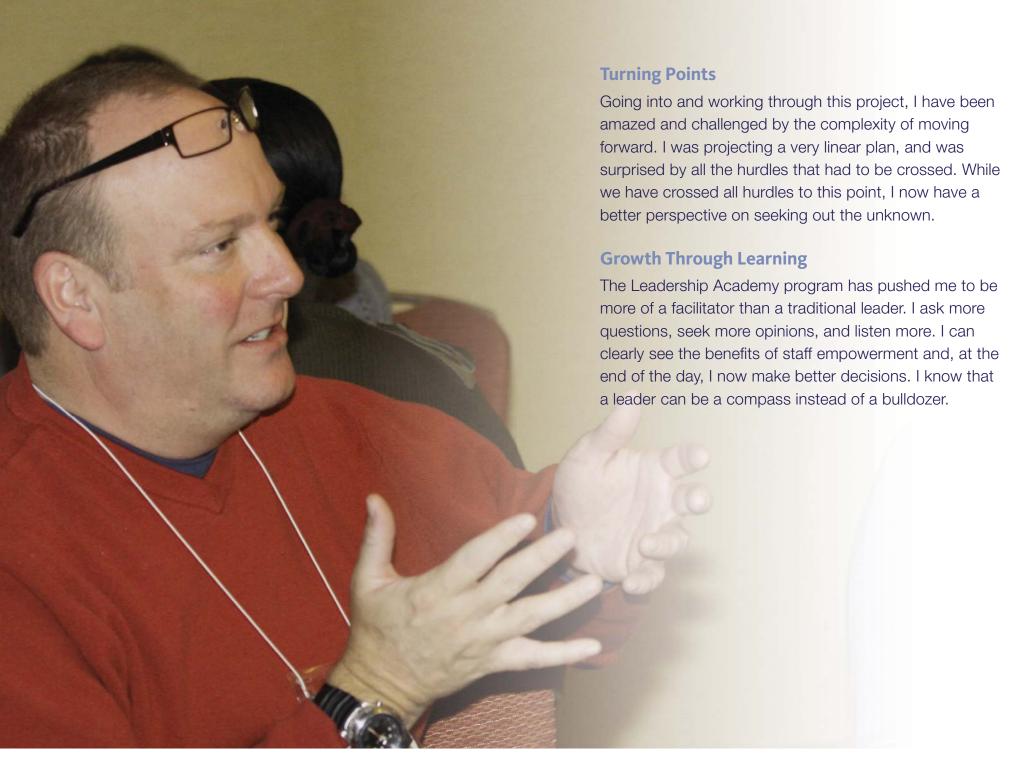
#### **Health Center Expansion**

#### **Making a Difference**

My Action Learning Project involves the expansion of our existing health center, essentially doubling its size. The community's need for health care has exceeded our current capacity. To continue to serve our current members, as well as to be viable going forward, the expansion is viewed as a necessity. The project has been ongoing for quite some time, and we plan for completion at the end of 2012.

#### **Leadership Influences**

This project has been challenging and rewarding at the same time. The process has been slower than expected, causing concern among some of our stakeholders. The positive aspect has been the collaborative approach we have taken by including staff and members in the design of the expansion. While not finalized, I believe all parties are on board and feel like contributors and partners in the project.





### **ANNEMcCARTY**

Director of Human Resources
Alzheimer's Resource Center, Plantsville, CT

#### **BIO SUMMARY**

Anne McCarty is director of human resources for the Alzheimer's Resource Center. She earned her degree in psychology from Fairfield University and is a member of the Human Resources Association of Connecticut. Anne is the fourth member of her organization to be a Fellow of the Leadership Academy.

### **Enriching and Improving Lives**

### **Making a Difference**

The mission of the Alzheimer's Resource Center is improving the lives of the people affected by this disease, their family members and staff who care for them. In my role, I feel a great responsibility to improve the lives of our staff, who dedicate themselves to caring for and improving the lives of our residents. As I create a program that will combine some traditional aspects of employee wellness with programs including exploration of emotional intelligence capacities, I hope to enrich the lives of staff physically, emotionally, intellectually and socially.

### **Leadership Influences**

Discussions with mentors in my organization have encouraged me to develop a wellness program that reaches beyond a traditional model and can be constantly evolving and shared with other organizations. I have reached out to partners, including the Insight Meditation Society and Phoenix Theater Group, that will engage our staff in further exploring empathic development, emotional intelligence, life stories and awareness of being present and vulnerable. Incorporating these practices in our organization will enrich the lives of the people who live, visit and work with us.



During our Academy class time together, we engaged in the "fly on the wall" exercise. This provided feedback and reflections about how I approach my Action Learning Project and reminded me that I must engage my staff in planning to ensure that the wellness program addresses their needs and interests, not just what I think they want. I have also found that attunement to the "balcony" and "dance floor" concepts referenced in Ron Heiftez's book, *Leadership Without Easy Answers*, has reminded me to stretch myself to move larger initiatives forward while staying on top of the day-to-day needs of my organization.

### **Growth Through Learning**

My knowledge of aging services has broadened as has my personal leadership. The engaging books we read, classroom time spent developing leadership capacities, and opportunities to learn from resident leaders have been invaluable. Most influential were our site visits and meeting passionate leaders and their staff who shared their successes and challenges as they strive to care for the people they serve. These experiences and the incredible connections made with 2011 class Fellows are invaluable as I seek to influence the way we care for people in our center and the positive impact we have on our staff.



### **TANGIMcCOY**

Chief Executive Officer McGregor PACE, Cleveland Heights, OH

#### **BIO SUMMARY**

Tangi McCoy is a licensed nursing home administrator with more than 25 years of health care experience. As the chief executive officer of a Program of All-Inclusive Care for the elderly (PACE), Tangi has extended her health care knowledge to include community-based long-term care.

### **Increased Retention Through Services** Offered to Staff

### **Making a Difference**

Often, organizations believe they offer great services and benefits to employees. Simultaneously, management staff appear perplexed when they're made aware of morale and turnover challenges. My project will allow management to see that employees place great value on services and benefits that won't have a significant financial impact. The project will show that by listening and implementing at least one of these benefits, we can improve staff morale significantly, increase retention and deliver an even higher quality of care and services to residents and participants, ultimately increasing enrollment and allowing for growth.

### **Leadership Influences**

As I continue to gather information through research and the interview process, relationships have improved significantly. Mentors and stakeholders appear intrigued and supportive of the project's mission. Ideas are being shared and suggestions given to gain the best knowledge and the desired outcome. Referrals have been given to support other organizations that may be interested in the same outcome for their employees.

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I solicited the support of the human resources manager because I felt she had a good rapport with staff and understood their needs. A turning point came when I asked her to help me with the project so she would realize its significant, potential value to the organization and human resources' vital role in its implementation.

### **Growth Through Learning**

Both the project and the Leadership Academy have helped me understand what type of leader I am and the opportunities to improve. I now have a better understanding of my professional environment and what type of leader is desired in the organization. I understand how to foster a positive outcome while developing others to become great leaders as well.



### **CARRIEMcGLAUGHLIN**

Director, Information Systems Technology Ohio Presbyterian Retirement Services (OPRS), Columbus, OH

#### **BIO SUMMARY**

Carrie McGlaughlin is director, information systems technology, at Ohio Presbyterian Retirement Services. She is also program manager, ethics and compliance. She has her bachelor's degree in health care information systems management from Franklin University. Carrie and her husband, Gerry, have three boys, Tyler, Jacob and Andrew.

## Establishing Information Systems as a Service at OPRS

### **Making a Difference**

This project establishes the business plan and components necessary for OPRS to offer Information Services to other organizations in the long term care and community based services industry. At OPRS we are a proven leader in aging services and have the technical and analytic skills, background and longevity to offer technical services to other organizations. As reimbursement continues to be a challenge to most organizations, this business model will allow partner organizations to garner the economy of scale our expertise and services will offer so that they may focus on the quality, care and services they provide to their clients.

### **Leadership Influences**

My original project idea differed entirely from this plan. As part of my original project, I had the opportunity to be involved in meetings and planning sessions that were outside my normal technical scope. Those interactions have broadened my ability to understand and consider other aspects of the organization and will be useful in my new project direction. OPRS has an immediate need for a business plan for offering information systems as a service. I have discussed the project change with several of my leaders and mentors, and they are supportive of the new plan.



My original project was in support of an initiative of an OPRS executive; after a change in that leadership, I no longer had a stakeholder guiding the initiative. Although the original project may have given me and OPRS meaningful results, I no longer had passion for the idea. My CIO and mentor, Joyce Miller Evans, recognized this and offered me the opportunity to brainstorm with her, which led to this new project. This turning point taught me that I can be true to my expertise and passions and still grow and learn as a leader.

### **Growth Through Learning**

Participation in the Leadership Academy, including the readings and discussions, has broadened my ability to be reflective and introspective. I have gained the courage to take time to analyze situations and the skills to adjust my style for more effective results. The program has given me the gift of 31 supportive colleagues and friends across the country. The action learning process has taught me to embrace change, continue to grow and maintain an open dialogue with other staff and peers to ensure that they are motivated and their passions and ideas are being heard.



### **CHRISTINEMORRISSEY**

Associate Director Golden West, Boulder, CO

#### **BIO SUMMARY**

Christine Morrissey is the associate director of housing for Golden West. She moved to Colorado after receiving her B.A. from Villanova University. Her experience with a hospital management company fostered her interest in aging services. She received her M.A. in gerontology from Naropa University and has been with Golden West since 2008.

## Creating Intergenerational Relationships Through Lifelong Learning

### **Making a Difference**

The goal of my project is to foster intergenerational relationships in both an academic setting and our residential community. Desired outcomes include a visiting professor lecture series, opportunities for residents to audit classes at local colleges and an internship program to bring students into the residential community. I hope that introducing opportunities for lifelong learning will engage the residents with one another as well as with a younger generation and give those residents who have backgrounds in education an opportunity to tap back into their fields of expertise.

### **Leadership Influences**

As I have discussed the vision of my Action Learning Project with my team, I have been given new insights and ideas as to how this can be developed. It is encouraging to have a new platform fostering conversations and ideas that enhance the services we bring to the residents of Golden West. I have also recognized a broadened scope of my project from my original desired outcomes. This is no longer "my" project; it is an opportunity for our organization to create common goals that will be an ongoing benefit as we look toward the future.

The Leadership Academy experience has me exploring a number of ideas to continually create an enriching experience at Golden West. For example, as important as the outcomes of the project are, I have also become more involved in advocacy in our community and encouraging others to do the same. The overall process of the program has resulted in a new way of thinking for me. I create time to look at the big picture and the future on a regular basis while still managing the details of the day-to-day needs of the community.

### **Growth Through Learning**

I have grown more comfortable in presenting my perspective and seeking the perspectives of others. That is a result of the relationships I have developed over the past year. The Academy has opened my eyes to the true value in building relationships with stakeholders at every level of my organization. Building those relationships creates resonance within an organization and, in turn, helps move people in a positive direction. The support I have had from this group and my team at home has helped me see my path more clearly as I continue to develop as a leader.





## JULIEMURRAY Director of Real Estate Development Ecumen, Shoreview, MN

#### **BIO SUMMARY**

Julie Murray is the Director of Real Estate Development for Ecumen in Minnesota. Her newest two communities were awarded the *Minneapolis/St. Paul Business Journal's* "Best in Real Estate for Senior Housing" in 2010 and 2011. She is a graduate of Texas Tech University, is married, and has two daughters.

### **Boomer Intergenerational Housing**

### **Making a Difference**

My project is to create an intergenerational housing community that is appealing to baby boomers while being open to all ages. Many times I have heard that some seniors "don't want to live around old people." My goal is to create communities that seniors, especially baby boomers, will want rather than need. This project aligns perfectly with Ecumen's mission of creating home for older adults wherever they choose to live and actually strengthens the mission by appealing to people at all ages and allowing our organization to serve them longer.

### **Leadership Influences**

My mentors have embraced my project so completely that it has evolved to become a part of Ecumen's "Think the Unthinkable" strategic development movement for the future of our organization. I have volunteered to lead a task force to further explore and develop this concept. Through discussions with my mentors, my project has grown into a more robust, thoughtfully planned initiative that, if financially feasible, will move forward to offer housing communities that are not age segregated. Working with partners of varying backgrounds, from architecture to financing, the project is being shaped by very talented individuals.

I asked each of my partners (architect, contractor and finance) to work on this project pro bono during development. Initially it was uncomfortable to ask for help. I found the key was to get them committed to the vision and opportunity to change our field for the better. They all were very agreeable participants, but being a non-paying customer slowed the process considerably as other, paid work understandably took precedence. It took additional meetings and conversations with these partners, as well as establishing some preferred deadlines, to move the work along at a reasonable pace.

### **Growth Through Learning**

The most valuable outcome from the Academy for me was the growth of my confidence in leading others. It gave me the opportunity to see myself through the eyes of outstanding leaders in our field. The outcome has been the ability to recognize both my strengths and weaknesses as a leader and craft a plan for my future development. I will continue to cultivate the relationships I developed this year well into the future. Knowing I can reach out to the Fellows for advice, information or a willing ear is a gift I will cherish and use often.





### **MARIEROSENTHAL**

Assistant Administrator
Jewish Home Lifecare, New York, NY

#### **BIO SUMMARY**

Marie Rosenthal is a registered nurse with 20 years' experience working in an acute care setting. Her career at Jewish Home began 12 years ago, and she is the assistant administrator for clinical services. She earned bachelor's and master's degrees in nursing and holds a New York nursing home administrator's license.

## Developing a Transitional Care Program for Subacute Elders

### **Making a Difference**

For over 150 years, Jewish Home Lifecare has been a force for progress and innovation built on a tradition of compassionate caring for individuals. My project is to introduce telemonitoring and medication management into the subacute setting to provide elders with education to prepare them for a safe and successful transition back into the community. Implementing a kiosk with disease-specific dialogues teaches self-management with daily coaching from a health care provider. My hope is that those discharged back into the community will have the tools they need to be as independent as possible.

### **Leadership Influences**

From the beginning, my colleagues and specifically my teammates in the Leadership Academy provided me with insight and suggestions to develop my Action Learning Project. Once back home, I was able to tap into the resources of our large organization and develop an implementation team for our telehealth project. Our vice president for business development became interested in the project and sent me out to partner with our referring hospitals. Throughout this year and while developing this project, I always felt that my team gave me the confidence to develop a sustainable program creatively.



Every moment of this program can be viewed as a turning point as it continues us on our lifelong journey of learning. On each site visit, I saw expanding possibilities for elders. With this I have challenged myself to become more involved in advocacy efforts. The insight I learned from Barry Berman, Executive Director of Chelsea Jewish Nursing Home, has stayed with me throughout the year: "see the gray." This has taught me to become much more open and approachable with my staff and to spend more time teaching, coaching and mentoring.

### **Growth Through Learning**

This process of self-discovery has taught me the importance of balancing personal and professional values. During the past year, I have rediscovered my passion for the work we do and have translated this into developing positive relationships with my colleagues. One thing that struck me throughout the year was the importance of an organization staying true to its mission. This was reinforced at each site visit and with each leader we met. It has fostered in me the ability to communicate the mission to our staff and develop programs to support our mission.



### **GREGRUYLE**

Director of Facility Management Home Office, Lutheran Senior Services, St. Louis, MO

#### **BIO SUMMARY**

Greg Ruyle is the director of facility management based at the home office of Lutheran Senior Services in St. Louis, MO. He is married and has two daughters, ages 3 and 2. He provides facility support services for LSS's ten CCRCs and nine affordable housing communities.

# Enhancing Relationships to Achieve Increased Resident and Staff Satisfaction

### **Making a Difference**

The goal of my project is to build a greater understanding between the facility management department and the executive director's office. Expanding and enhancing organizational relationships will ultimately lead to a united "team" approach and to living our mission, "Older Adults Living Life to the Fullest." By understanding how each team works with the other and the role they play in the bigger picture, I aim to find greater resident and staff satisfaction, and to support and foster these relationships going forward.

### **Leadership Influences**

Having been in my new role for just a year, the relationships I have begun with many of the community leaders have emphasized to me that my project will have many layers. I have already learned that a "one size fits all" approach will not be part of the process and that change will come gradually. Progress may be measured in inches in some areas and miles in others. I have received great support from my peers, supervisors and the Fellows.

When applying for the program, I was the director of plant operations at a CCRC and had my project in mind for our community. I accepted a promotion around the same time I was accepted to the Academy. My new role as a support person for multiple sites was a huge turning point in the complexity and scope of my initial project idea. Another was my initial meeting with our COO to review my plan and the insight I gained from that meeting on my approach to the project. My interactions with the Fellows have been invaluable as well.

### **Growth Through Learning**

The Leadership Academy experience has been great for me. The interaction and interpersonal experiences are sometimes hard to describe. The resources and network of friends have been and will continue to be a blessing to my leadership development. I found that the in-person experiences allow a safe space for leaders to express their true feelings, triumphs and sorrows in a supportive, nurturing environment without the fear of judgment. This level of openness allows for a very rare and unique learning opportunity. I feel blessed to have been a part of the Academy.





### **JENNIFERTERRAY**

Clinical Systems Analyst and Resident Advocate Hebrew Health Care, West Hartford, CT

#### **BIO SUMMARY**

Jennifer Terray is the clinical systems analyst and resident advocate at Hebrew Health Care. She graduated from Boston College School of Nursing and received a master's degree in nursing from the University of Hartford. For 18 years she has devoted herself to the care for older adults.

## LeadingAge Connecticut Leadership Academy

### **Making a Difference**

The purpose of the LeadingAge Connecticut Leadership Academy is to bring the concepts of transformational leadership to a greater number of Connecticut's leaders in aging services. The goal is to reach out to emerging leaders in middle management positions. In a time of constant change, we need leaders to be innovative and collaborative at all levels of the health care system. Those leaders who participate in the Connecticut Leadership Academy will learn about themselves and how to lead change effectively.

### **Leadership Influences**

Relationship building has been a recurring theme throughout my Leadership Academy experience – specifically, how the nature of communication with an individual shapes the relationship. Listening at a level where one is open to changing his or her point of view at any time is the key to meaningful dialogue. By practicing communication at this level, I expanded my vision of leadership training for my organization into a plan with the potential to benefit emerging leaders in aging servicies throughout Connecticut. These relationships have given me the courage and confidence to reach for higher-impact goals.

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Many conversations became turning points. As I approached colleagues at Hebrew Health Care to discuss leadership training, I was careful to listen. My initial turning point was a challenge to expand the scope of the project to include organizations other than my own. Surprised by my own excitement over this new vision, I began talking to more colleagues, who directed me to others with a similar vision. Reaching out to them, I was inspired by their immediate support and enthusiasm and began to look more creatively at the purpose and scope of the project.

### **Growth Through Learning**

The past year has been one of self-discovery and renewal. Through deep reflection and dialogue, I have cultivated improved self-awareness. Uncovering my strengths and weaknesses; realizing my principles and boundaries; appreciating my motivations; and developing my support teams have given me a better sense of my leadership purpose. This increased awareness has given me the confidence to proceed in developing a Leadership Academy for Connecticut. My passion for educating and empowering others to be the best they can be has been reignited. Maintaining a continual process of self-discovery is the key to sustaining leadership.



### **STACYTERRELL**

Chief Health Services Officer, Kendal at Oberlin/Kendal Northern Ohio/ The Kendal Corporation, Oberlin, OH

### **BIO SUMMARY**

Stacy Terrell has served the field of aging with passion and joy for 30+ years. His education includes the thousands of residents he has known, his M.B.A. from Kent State and M.Div. from Ashland University. He and his wife, Michelle, are parents of Emily and Jillian.

## **Enhancing Continuing Care with Hospice Services**

### **Making a Difference**

Partnering with Senior Independence of Columbus, OH, my project is the creation and implementation of Kendal Northern Ohio's (KNO) own hospice program. This will enhance KNO's continuum of care at this crucial time for both residents and staff. This additional level of service will also enable KNO to provide Kendal hospice services to the greater community, delivered with excellence and compassion, thus reaching people not currently served by KNO and expanding the mission.

### **Leadership Influences**

Vital relationships with board members, executive and line staff members of KNO and Senior Independence have crafted what will be a unique program. It is this intentional dialogue with all constituents that has provided the conduit for adaptation, buy-in and a shared vision. For line staff, a prime consideration is the development of procedures and processes that will spawn a seamless flow of care coordination for Kendal residents and members. Discussions from this vantage assist in navigating the pitfalls that could result in frustration for those deployed to make the vision a reality.

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As with any change, one can never communicate enough with stakeholders including board members, residents, staff and families. Communication about the vision and "how to get there" must be multifaceted, consistent and interactive on several levels. When communication is not clear and consistent, assumptions will be made by different constituencies; assumptions that are false require even more effort to clarify and can actually derail the process. As leaders, we are charged with the honor and responsibility of ensuring that vision is followed with a workable roadmap to reach the shared destination.

### **Growth Through Learning**

As a result of my participation in the Leadership Academy, I am becoming much more thoughtful and deliberate as a leader, and less reactive. This can be a challenge given the many directions in which leaders are pulled every day. I have truly appreciated the shared learning experiences with each of my colleagues and consider each of them a rich resource. The site visits have been a catalyst for enlarging my vision for my own organization and my responsibility to be an advocate in many different venues.





### **TERITIFT**

Director of Quality and Compliance Eskaton Properties, Inc., Carmichael, CA

#### **BIO SUMMARY**

Teri Tift is a registered nurse and director of quality and compliance for Eskaton Properties in northern California. She is responsible for corporate consultant oversight and the education of varied staff in Eskaton's communities. Teri holds bachelor's and master's degrees in nursing, a gerontology post-graduate certificate and a doctorate of health administration.

## Intergenerational Living in Senior Housing

### **Making a Difference**

Eskaton's mission is to enhance the lives of seniors through innovative health, housing and social services. Its vision is to transform the aging experience. Because Eskaton's mission and vision are so heavily focused on the provision of services that are innovative, I chose to implement an intergenerational living program at Eskaton Henson Manor, an independent housing community. Although there are intergenerational programs in place in other senior communities, most of these involve children, as opposed to adult university students. This program was created as a mutually beneficial, collaborative living arrangement between university students and seniors residing at Henson Manor.

### **Leadership Influences**

Discussions with key Eskaton executives, the California State University Sacramento (CSUS) gerontology department chair and CSUS students have influenced the direction and progress of this program. Each stakeholder brings a specific perspective and goals to the creation of an intergenerational living program that must be addressed for the program to succeed. For example, the gerontology department chair's primary goal is to provide students with an opportunity to learn about aging through daily interaction with residents in a shared living environment. The community administrator hopes to provide residents with a stimulating social and intellectual environment to foster successful aging.



From the beginning, students expressed enthusiastic interest in community living with seniors; however, an appropriate student resident has yet to be found. Although stakeholders support an intergenerational living program that enhances person-centeredness at Henson Manor, challenges arose during implementation partially due to limited access to students during university breaks and the demanding schedules of CSUS and Eskaton stakeholders. These stakeholders continue to believe in the merit of an intergenerational program and are moving forward to market to a wider variety of students and to refine participation criteria. Without determination, I don't believe this innovative program would succeed.

### **Growth Through Learning**

The action learning process and relationships I have developed in the Leadership Academy have challenged me to think beyond the boundaries of my current position at Eskaton and the day-to-day tasks required of that position. Additionally, this experience provided me the opportunity to visit care settings that differ greatly from my own. These varied opportunities encouraged me to reflect on the possibilities my organization could embrace as we strive to provide innovative care to the individuals we serve. Finally, this experience renewed my passion for senior services, which I believe provides the foundation for transformational leadership.



### **DAVIDTROST**

Vice President of Management and Outreach Services St. John's Lutheran Ministries, Billings, MT

#### **BIO SUMMARY**

David Trost is a full-time husband and father of three and serves as the vice president of management and outreach services at St. John's Lutheran Ministries. David has worked at St. John's for 16 years and has held the positions of nursing home administrator and CCRC executive director.

## The Relevant Voice of Wisdom, a Council of Elders

### **Making a Difference**

As people age, voices are often lost or not heard. Less experienced generations have much to hear and gain from those who have experienced a world war and a lifetime of exponential transformation in education, technology and industry. To offer our elders a voice, I propose forming a diverse elder council that would engage in conversation, debate and reflection on a variety of topics. Their goal would be to achieve consensus, with minority opinions documented as well. The outcomes of these conversations would be compiled, published and made available to a broad, appreciative audience.

### **Leadership Influences**

The Billings Gazette publisher is assisting in the Action
Learning Project's media development. Another key adviser is
former Billings mayor and urban studies professional Chuck
Tooley, a prospective council facilitator. My conversations
with Mr. Tooley were transformational; the original project
gathered influential names from different spectrums and
backgrounds in the community by casual nomination.
Mr. Tooley suggested that this group was not adequately
representative of the community. We now seek participation
by the Area Agency on Aging, retired business leaders,
senior-living resident councils, local political groups and
others to bring forth nominations.

To my surprise, the Action Learning Project has provided rich opportunities to seek counsel and guidance from others, and to accept their input without feeling threatened or defensive. I originally was sure of my direction, but with reflection and intentional engagement, I was able to see the weaknesses in the project and make significant changes. Although the time commitment required to engage more stakeholders is greater than I had anticipated, I believe these interactions will ultimately create a project that will be stronger and more widely accepted.

### **Growth Through Learning**

Historically, my leadership style has been directive, intentional and solution-driven. The action learning process helped me develop a more reflective approach to problem solving, which resonates internally in my own decision-making process and externally as I collaborate with my colleagues. The Leadership Academy experience has been personally and professionally transformative. Active reflection is both productive and contagious when helping others reflect on their issues vs. solving them for them. As a result of this positive experience, I will develop and sustain a more responsive, reflective approach to problem solving throughout the rest of my career.





### **MURIELVANOORDT**

Vice President and Senior Administrator Bethesda Dilworth/Bethesda, Health Group, St. Louis, MO

#### **BIO SUMMARY**

Muriel Van Oordt is vice president and administrator of Bethesda Health Group's largest skilled nursing community in St. Louis, MO. She is a wife and mother of two who is active in her small hometown community of Weldon Spring Heights and is an avid collector of American folk art.

## From "Meal Service" to "Dining Experience" – A Transformation

### **Making a Difference**

The purpose of my project is to move beyond the traditional nursing home model of meal service, which is targeted at simply nourishing the body, to set the stage for a dining experience that also nourishes the souls of those who are served and those providing the service. My hope is that the process established through this project will be sustained, allowing for ongoing transformation based on the everchanging needs, desires, dreams and expectations of our residents, employees and members of the community.

### **Leadership Influences**

At the outset, I thought I had a clear idea of what needed to change and how long it would take to achieve the transformation. As I engaged others in the process, my timeline expanded, and the straight-line path I had envisioned developed curves and stop signs. Meetings with groups of executives, residents, employees and government officials yielded lots of ideas and perspectives. Together we have developed a mission statement to articulate our shared vision and to guide and sustain us as we move through this transformational process.

My greatest challenges have been related to time and trust. At first, I struggled with the need to "let go" of some of my day-to-day responsibilities and trust that others could assume them. I've been pleasantly surprised by the support I have received. Through work with my core team, I have learned the benefit of "stepping back" to guide the process while others engage in supporting and carrying it out. Striking the right balance of input, delegation, assistance and flexible timelines has been key to maintaining support and shared enthusiasm.

### **Growth Through Learning**

This finely orchestrated program has helped me to refocus on the need for balance in all aspects of life and has allowed me to experience the flow of "transformational leadership." I have been given the gift of stepping out of the hectic pace of work to take time for reflection and have been reminded to always stay true to my inner self. The sharing of stories, successes and challenges with the Fellows has reinforced the basic needs we all have for trust, acceptance and compassion and the knowledge that, through diversity, we gain strength and a more accurate perspective.





### **DAWNVEH**

Vice President of Health Services Wesley Towers Retirement Community, Hutchinson, KS

#### **BIO SUMMARY**

Dawn Veh began her service as a nurse's aide in 1981 and became a licensed administrator at age 22. She began serving at Wesley Towers in 1991 and obtained her M.B.A. from Wichita State in 2001. She is married to Darron; children are Taylor and Gannon.

### Home Is Where the Care Is

### **Making a Difference**

With a re-evaluation of services provided through the home health department to independent/congregate living residents, the campus can allow residents more choice in where and how they receive service enhancements to age in place. The new direction in all levels of living across the country is person-directed care; as residents and their family members become more knowledgeable, their expectations for guiding their own pathways will continue to expand. The challenge to CCRCs is to provide services at various living levels with the blurring of differences between services at each of those levels.

### **Leadership Influences**

There is an open-mindedness developed through the Leadership Academy, and this has allowed for a decrease in the territorial aspect of providing services in this review process. The relationships between staff in talking about services provided by different departments are beginning to break the "silos" that can become so prominent when we are all focused on our own mission. There is a calmness in the approach because of the team feeling, and the focus can be on the residents helping to develop their own strategies for quality of life.



One of the biggest insights has been an understanding of how many departments can be affected by evaluating services provided through one department. My focus has been mainly on skilled care services in the past, and I could understand how the different departments are affected by a change in service in one area. But in looking at services that are provided in many different structures on campus, I did not grasp the complexities and the need for understanding and input from all parties until really getting into the complex steps through this assessment of services provided by home health.

### **Growth Through Learning**

After being an administrator for 26 years and completing my M.B.A., I had no idea that one program could have such an effect on my leadership abilities. The Academy members bring a variety of experiences and backgrounds to the discussions and provides a "global perspective" to each topic at hand. It is easy to get bogged down in details in this heavily regulated field. You are only limited by your vision and commitment to mission; each of us has the ability to provides for great change in quality of life provided to our seniors.



### **LISAHOTCHKISSWACHT**

Director of Corporate Compliance
The Wartburg Adult Care Community, Mount Vernon, NY

### **BIO SUMMARY**

Lisa Hotchkiss Wacht joined The Wartburg in 2006, and is the director of corporate compliance. She is a licensed nursing home administrator in New York and Connecticut. Lisa is a certified aging-services professional (CASP 2009) and a member of the Health Care Compliance Association.

### **Governance and Board Development**

### **Making a Difference**

A conscious decision was made during The Wartburg's current period of growth and repositioning to focus on governance. My Action Learning Project formalizes board development through the design and implementation of a framework for board recruitment, orientation, education and evaluation. When fully realized, the board will be in a stronger position to support and nurture new programs and initiatives, becoming much more engaged and integrated in the daily work of our campus. The major tenets of our mission will be illustrated through their work, and a stronger sense of community will be created for those we serve.

### **Leadership Influences**

My exposure to the board of directors has dramatically increased through my work in board development and the mentoring relationships formed as a result. I continually gain insight from the unique perspectives the directors bring from their professional fields. Directors individually guide and help me in my work and, in return, the product produced is of benefit to the board collectively. My positive working relationship with The Wartburg's president/CEO has helped to propel my project forward as he supports my work, fosters my relationship with the board and serves as a mentor in my professional endeavors.



At board meetings, and through liaison work with the Governance and Nominating Committee, I have worked with individual directors and the entire board. Given the opportunity to participate in this capacity, I have felt successful in gaining the board's interest and support. Experiencing a positive response was a turning point in my action learning process; I recognized that collaboratively we have the opportunity to grow this body of work to a level that will not only benefit our own organization but might someday be used as a model for board development in our field.

### **Growth Through Learning**

During the Leadership Academy, I have realized the significance of individual perspective. I have become more introspective in assessing how to approach tasks and challenges, especially when they involve the input of others. Relationships among team members pivot on each person's perspective; the consideration and emphasis one gives to perspective can strengthen or weaken relationships within the team. I have learned that for a leader to succeed, that leader must understand how all persons on the team view themselves and their relationship to the work at hand.



### **JUSTINWEBER**

Administrator, St. Paul's Senior Homes & Services San Diego, CA

#### **BIO SUMMARY**

Justin Weber is an Administrator at St. Paul's Senior Homes & Services in San Diego. He has been with St. Paul's for more than four years and became the administrator at St. Paul's Villa (assisted living and memory care) in September 2011.

# Creating the St. Paul's Dining Experience for Residents and Participants With Dementia

### **Making a Difference**

My Action Learning Project is taking the "Dining With Friends" concept created by the Alzheimer's Resource Center of Connecticut and adding other ideas specific to my organization to create the St. Paul's dining experience for our residents and program participants with memory issues. We pride ourselves on a resident-centered approach to care and living, and meal times are crucial parts of the day. By providing staff the training, tools and time to facilitate a truly meaningful experience, St. Paul's will differentiate itself further as the place in San Diego where people want to bring their loved ones for care.

### **Leadership Influences**

To understand what people feel is the best case for a dining experience, I've spoken with staff, the seniors we serve, their friends and families, and others in the senior-service field. Each person's perspective offers insights that can be useful. One of the most challenging aspects of creating this program is meshing the differing needs and desires of the various stakeholders with the daily constraints that are always present: time, costs, regulations, etc. While the project is directly aimed at a specific goal, allowing it to be fluid in how we get there has been particularly rewarding.

Leading a collaborative project from the ground up offers a lot of challenges. Getting approval from everyone involved can take a tremendous amount of time, so authoritative decisions are necessary. Team chemistry can be affected when decisions are made by someone who is not the recognized "expert." An important aspect of the project is to facilitate conversation and ideas while making the necessary judgment calls to keep things on track. Learning when to elicit feedback and when to simply decide does not seem extraordinary but can be the difference between a successful or disgruntled team.

### **Growth Through Learning**

The Leadership Academy experience has given me a view of myself through others' eyes. The most valuable aspect of the entire experience has been sharing thoughts, issues, questions, successes and concerns with others in the group, many of whom have similar things on their mind. The conversations we have shared and exercises we have gone through have given me great insight into who I am now and who I hope to be. This perspective allows me to grow in the areas I need to, so I can be a truly transformational leader in our field.





### **JENWILSON**

Director of Well-Being
Carol Woods Retirement Community, Chapel Hill, NC

### **BIO SUMMARY**

Jen Wilson is committed to focusing health services on dignity and choice and was drawn to aging services by the field's intentional efforts to cultivate person-driven care. She has a master's degree in public health from the University of North Carolina at Chapel Hill.

### **Creating Integrative Health**

### **Making a Difference**

My Action Learning Project takes our resident-driven, holistic approach to the next level: integrative health. This model assembles an interdisciplinary team as the Department of Well-Being, and it integrates conventional with complementary and alternative therapies. Informed choice, shared decision making and self-management are central principles. Residents will determine what is important to their quality of life, and they will partner with staff to understand and access the constellation of services and resources available. I intend for this model to demonstrate the autonomy that can and should accompany aging.

### **Leadership Influences**

The organization's leadership team, well-being department staff and, most importantly, residents have eagerly supported the vision and offered stellar ideas for refining it and making it reality. I have confidence that these individuals will continue to collaborate with me and one another in transforming our model of service. This participatory approach will result in a model that is what residents wish it to be.

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As I began work on my project, I reflected back on Ronald Heifetz's book, *Leadership Without Easy Answers*, and his "dance" metaphor. Creating integrative health requires time on the "dance floor" being in the midst of the day-to-day, as well as on the "balcony" seeing the big picture and considering vision and strategy. I realized the importance of balancing my time in these two places and ensuring that I do not get caught up in the dance, but appreciate its wholeness and focus my sights on how it will transform.

### **Growth Through Learning**

I recognize the value of balance and agility. I am becoming more intentional about making time for rest, reflection and action. Also, I have learned that a leader must be able to quickly diagnose a situation and apply a leadership style that is both true to herself and effective in addressing the matter at hand. Finally, the relationships I have developed with colleagues have shown me the value of time and space for reflection with individuals with similar passions and work. The objectivity and dedication present in these interactions inspire confidence, innovation and action.



#### SITE VISIT HOSTS

LeadingAge extends deep gratitude to the following member organizations for offering the Class of 2011 Fellows the opportunity to experience real-world transformational practices and for providing meeting space and logistical support.

Motion Picture and Television Fund Wasserman Campus Los Angeles, CA

TELACU's Tamayo Restaurant

Los Angeles, CA

Chelsea Jewish Foundation's Leonard Florence Center for Living Boston, MA

Peter Sanborn Place, Home Care and Day Services Boston, MA

Selfhelp's Helen R. Scheuer House/Selfhelp Weinberg Apartments New York, NY

Village Care of New York's Rivington House New York, NY

Elizabeth Seton Pediatric Center New York, NY

### **2011 LEADERS IN RESIDENCE**

LeadingAge thanks the following aging-services leaders for sharing their professional and personal leadership stories through intimate conversations with the Class of 2011, allowing the Fellows to learn from their first-hand experiences.

Kathleen Anderson

Goodwin House, Inc. Alexandria, VA

**Matthew Anderson** 

The Osborne Rye, NY

Leo Asen

Selfhelp, Inc. New York, NY

**Barry Berman** 

Chelsea Jewish Nursing Home and Foundation Chelsea. MA

Jim Bernardo

Presbyterian Senior Living Dillsburg, PA

Jasmine Borrego

TELACU Residential Management Los Angeles, CA

Karen Brannen

Jefferson's Ferry Long Island, NY

Joseph Breed

St. Margaret's House New York, NY

Kevin Burke

North Hill Communities

Boston, MA

Jacquie Carson

Peter Sanborn Place, Home Care and Day Services Reading, MA

**Nellie Cole** 

McKendree Village, Inc. Hermitage, TN

John Diffey

The Kendal Corporation Kennett Square, PA

Sandy Douglass

Methodist Home Washington, DC

Seth Ellis

Motion Picture and Television Fund Woodland Hills, CA

**DeAnn Escalante** 

Carol Woods Retirement Community Chapel Hill, NC

Michael Fassler

Beth Abraham New York, NY

**Doug Fleegle** 

United Church Homes and Services Newton, NC

#### **2011 LEADERS IN RESIDENCE**

**David Gentner** 

The Wartburg Adult Care Community
Mount Vernon, NY

Kay Kallander

ABHOW Pleasanton, CA

Mark Kator

Isabella Geriatric Center, Inc. New York, NY

Carol Katz

Loomis Communities, Inc. South Hadley, MA

Lisa Krinsky

LGBT Aging Project Boston, MA

Susan McWhinney-Morse

Beacon Hill Village Boston, MA

Win Marshall

Christian Church Homes of Northern California Oakland, CA

Roger Myers

Presbyterian Villages of Michigan Southfield, MI

**Betsy Mullen** 

Leonard Florence Center for Living Chelsea, MA

Kelly Smith Papa

Alzheimer's Resource Center Hartford, CT

**Tammy Retalic** 

Hebrew SeniorLife Boston, MA

Michael Rosenblut

Parker Jewish New Hyde Park, NY

Randolph Rowel

Morgan State University Dept. of Behavioral Health Sciences Baltimore, MD

**Pattye Sawyer** 

Suncoast Hospice Clearwater, FL

Elissa Sherman

LeadingAge Massachusetts Newton, MA

William Smith

Aging in America Inc. Bronx. NY

Patricia Sprigg

Carol Woods Retirement Community Chapel Hill, NC

**David Sprowl** 

Lutheran Towers Atlanta, GA

#### **2011 LEADERS IN RESIDENCE**

**Holly Argent Tariq** 

St. Mary's Episcopal Center, Inc. New York, NY

**Barbara Thomas** 

Kendal at Oberlin Oberlin, OH

**Kern Tomlin** 

Presbyterian Villages of Michigan Southfield, MI

Patricia Tursi

Elizabeth Seton Pediatric Center New York, NY

Sally White

IONA Senior Services Washington, DC

**Audrey Weiner** 

Jewish Home Lifecare New York, NY

Mark Zwerger

The Osborn Rye, NY

### **DESIGN TEAM AND FACULTY**

LeadingAge appreciates the unique and inspiring gifts that Judy Sorum Brown brings to the design team and the Leadership Academy program. Judy serves as thought leader, lead facilitator and advisor to the Fellows and coaches.



### Kevin Bradley, M.S. Education Development Manager

LeadingAge Washington, DC

#### Judy Sorum Brown, PhD.

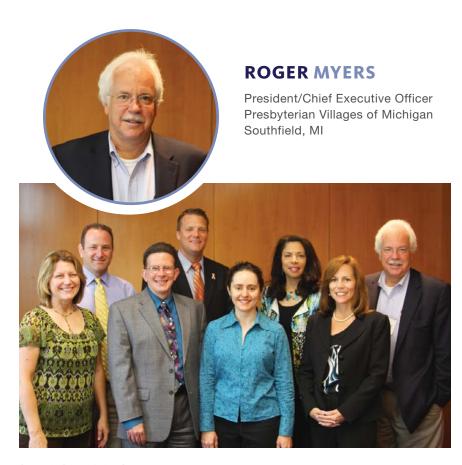
University of Maryland College Park College Park, MD

#### Wendy Green, M.A.

Director, Leadership Development LeadingAge Washington, DC

### COACH

LeadingAge is very grateful to offer the Fellows the rich background and expertise of the following 2011 coaches who regularly interface with Fellows and the design team to further the learning and to offer their wisdom and guidance as experienced leaders in our field.



from left to right front row: Terri Tift, Stacy Terrell, Jen Wilson, Claire Halton, Christopher Ferreri, Mike Logan, Deborah Enty, Roger Myers

### COACH



**PATTYE SAWYER** 

Vice President, Community Health Programs Suncoast Hospice Clearwater, FL



from left to right front row: Carrie McGlaughlin, Cindy Hogan, Lisa Hotchkiss Wacht, Jennifer Terray, Thomas Dorough, Justin Weber, Greg Ruyle, Yolanda Johnson, Pattye Sawyer

### COACH



BARBARA THOMAS
CEO

CEO Kendal at Oberlin Oberlin, OH



from left to right front row: Barbara Thomas, Marie Rosenthal, Morgan Gable, Dawn Veh, Mike Lucas, Anne McCarty, Christine Morrissey, Julie Murray, Christopher Bernabe

### COACH



MATTHEW ANDERSON

Administrator
The Osborn
Rye, NY



from left to right front row: Janet Herron, Tangi McCoy, Vanessa Andrews, Muriel Van Oordt, David Trost, Matthew Anderson, Linda Barkley, Janelle Chadwick, Scott Bushong



### LeadingAge LEADERSHIP ACADEMY

### **ALUMNI NETWORK**



### Congratulations to the fifth Leadership

FELLOWS,

Academy class! I hope this past year with the Academy has brought tremendous growth to you – both professionally and personally. Your hard work, dedication to learning and commitment to the field are testament to the strengths LeadingAge saw in your application for the program.

DEAR CLASS OF 2011

**TOMAKINS** 

Throughtout the year, you built lifelong friendships and learned things that will benefit not only your organization but also your personal development. If you're like the Fellows in the first four classes, the program has left you with one giant question: "What's next?"

Looking forward, it is my privilege to welcome you to the next chapter in your journey – your status as a member of the LeadingAge Alumni Network. As an alum, you'll have the opportunity to give back to the field through participation with other alumni on a number of committees and initiatives. Whether you're interested in shared learning or service, communications or fellowship, board development or fundraising, the network will afford you the chance to build on your involvement with the Academy.

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 LeadingAge Alumni Network. I look forward to our common work together.

Sincerely,

Tom Akins, President

LeadingAge Leadership Academy Alumni Network





Members of the LeadingAge Leadership Academy Alumni Network during the Habitat for Humanity Service Project at the 2010 Annual Meeting in Los Angeles, CA.



Leadership Academy Class of 2011

#### APPLY TO THE LEADERSHIP ACADEMY

<u>Applications</u> for the Leadership Academy Class of 2013 will be available in the spring of 2012. For more information contact <u>Kevin Bradley</u>.

Special thanks to **Matthew Anderson** and **Pattye Sawyer** for the photographs