



2012 LEADERSHIP ACADEMY

# TRANSFORMATION *in* action

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2012

# ERSHIP ACADEMY



Fellows

# ACTION LEARNING

**Action Learning** is a process that engages people in innovations that lie beyond their usual job descriptions. It is used for improvement and break-through thinking across all sectors and at all levels. The focus goes far beyond the outcome of a specific project; rather, it is the learning obtained through the experience that enhances one's own leadership development.

Action Learning Projects (ALP) and, more importantly the process of action learning, allow Fellows to champion innovations to bring back to their organizations. Projects have ranged from developing partnerships, to managing change, to embracing new technologies. Through the ALP, they gain the opportunity to better their organization and the people they serve.

The 2012 Fellows were asked to explore the following questions related to the ALP and 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?

## **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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# JESSICA BOLEN

Director of Administrative Services  
Montereau, Inc., Tulsa, OK

## BIO SUMMARY

I serve as Director of Administrative Services for Montereau, a CCRC in Tulsa, OK. I began my work in aging services in 2001 as a Retirement Counselor while the community was being developed. I earned a B.A. in Business Administration from William Jewell College in Liberty, MO.

# ***Values-Based Service and Leadership Program***

## **Making a Difference**

The purpose of my Action Learning Project is to collaborate with residents and employees to develop a service and leadership program that is focused on the values guiding the mission of our organization. This program will serve as the foundation for leadership development and training for new team members. The first phase will be establishing the new service program with the goal of achieving consistently above-average resident satisfaction. The second phase will be the leadership development program providing ongoing opportunities for the management team as well as emerging leaders in our organization and the Tulsa community.

## **Leadership Influences**

Initially my project was focused on a leadership development program. Recently I was asked by our CEO to coach a committee of employees to work on a new service program. His inspirational leadership has helped develop my skills in building team relationships. Working with this committee, I quickly recognized how the concept of values-based service provides a strong foundation upon which to build a leadership development program; therefore, I included it as part of my action learning process. In addition, I began building relationships on this committee to mentor these emerging leaders as they develop their skills.







## Turning Points

A turning point for me was the insight gained working with this committee as their coach rather than as their leader. I was inspired by their level of creativity, excitement and passion for serving older adults and creating a work environment that is fun and rewarding. I gained a new appreciation for creating a space where those who have something to say will do so. The committee norms have developed so that everyone has a voice and takes pride in the opportunity to be part of taking service and hospitality to the next level of excellence throughout the community.

## Growth Through Learning

I have learned to lead by listening and asking questions that help others find solutions. I have developed an increased awareness of the importance of gathering the insight of peers and front-line colleagues, resulting in a more collaborative decision-making process. The relationships I have developed have increased my awareness of the range of services provided to older adults and the similar challenges we face. Especially while working on the study circle concept, I learned to appreciate the power of a unified team working toward a common vision and the diversity of outcomes.



# DIANE BURFEINDT

Vice President of Operations & Housing with Services  
Presbyterian Senior Living, Dillsburg, PA

## BIO SUMMARY

I have been in the health care field for 20 years and am currently the Vice President of Operations/Housing with Services for Presbyterian Senior Living. In this role, I am responsible for the operations of all affordable and market-rate housing communities.

# ***Improving Care Coordination in Housing Communities***

## **Making a Difference**

My project centers on the role that housing can play in the improvement of health access and outcomes for residents. Through collaborative relationships with other community organizations, my goal is to work with our housing communities to identify and develop relationships that are mutually beneficial and provide a needed link between care providers and our residents. I expect this to evolve over the years, beginning with one campus this year and extending it across the organization as we demonstrate to health care providers the health outcomes that can come from these relationships.

## **Leadership Influences**

I have seen a small partnership at one of our housing properties evolve to where it is now due to the relationships that have grown over time. As individuals involved in the partnership began to discuss the outcomes, it became apparent that there were more opportunities to grow the relationship and bring others into the vision. This impacted the direction of the project because there were many different points of view as well as different levels of expertise that enabled me to learn about areas in which I had not been as well-versed.



## Turning Points

There have been several turning points throughout this process, but the biggest one for me was to understand that the initiatives that are underway could begin without a final result being planned. The project grew as the relationships matured, and it improved as different people became involved in ways that I could not have planned or imagined when we first embarked on this journey. The ability to allow the process to change the outcome was a growth experience for me.

## Growth Through Learning

The Leadership Academy and its components have been an experience that is difficult to describe, but has opened my mind to new opportunities to make a difference. Through the in-depth conversations that resulted in a deeper understanding of myself, to participating with the group in answering difficult questions about ourselves, our leadership abilities and our industry, this experience has given me a new respect for what it takes to continually evolve as a leader.





# AMIDESAI

Administrator

Brittany Farms Health Center, New Britain, CT

## BIO SUMMARY

I am a Physical Therapist and a Nursing Home Administrator with over 25 years of experience serving older adults, both as a Rehabilitation Manager and an Administrator. I oversee the operations of a 282-resident community that specializes in sub-acute, dementia and long-term care.

# ***Achieving Triple Aim: Creating a Post-Acute Model of Care***

## **Making a Difference**

The concept of Triple Aim originated as a proposed solution to our health system's ills. The three main objectives are: improve the experience of care; improve the health of populations; and reduce the per capita cost of health care. My goal is to create post-acute models of care for diseases such as congestive heart failure (CHF) and pneumonia by using outcomes and data to provide enhanced quality care with improved access to the right provider at the right time, thereby reducing health care costs. This can be achieved by aligning organizations throughout the continuum to provide measurable quality care.

## **Leadership Influences**

Over the past couple of years, I have been fortunate to participate in regional collaborative spearheaded by area hospitals and Qualidigm, to reduce hospital re-admissions for CHF patients. Through this process, my organization has developed an evidence-based integrated program in which I have seen a transformation occur from independent (and often fragmented) care to interdependent and collaborative care. I have seen progress toward our overall goal to reduce the frequency of transfers to acute hospitals. These transitions can be emotionally and physically difficult for residents and result in numerous, costly complications.

## Turning Points

The single most important turning point has been the realization of how value-driven partnerships are essential for success in the health care reform world and that hospital and post-acute care systems need to develop relationships based on outcomes and not historic relationships. I have seen hospitals and post-acute care systems developing partnerships and openly sharing information when silos are broken, to achieve the desired outcomes. The essential next steps are to launch coalition partnerships with hospitals and post-acute systems of care through selection of preferred partners that will collectively achieve the goal of “Triple Aim.”

## Growth Through Learning

Through participation in the Academy, I have realized that leadership is an ever-evolving continuum. It has given me the ability to see clearly what my leadership path is and to be able to apply what I have learned to my action learning process. I now have the confidence and feel empowered to make a difference in my community; to lead my organization to develop successful partnerships to achieve outcome-based goals by developing a platform for post-acute models of care for various diseases and emerge as a leader in health care delivery.





# BARBARADICE

Chief Executive Officer

Castle Country Assisted Living, Castle Rock, CO

## BIO SUMMARY

As CEO of Castle Country Assisted Living, I feel I have an authentic leadership approach that has brought my organization recognition both locally and nationally. I live by these words: "If your actions inspire others to dream more, learn more, do more and become more, you are a true leader."



# ***Vintage Is Beautiful***

## **Making a Difference**

The “Vintage Is Beautiful” project can positively influence how individuals view aging. The number of Americans 60 years and older is growing, but society is not embracing the aging population. Negative stereotypes are hurtful to older people and age stereotypes are internalized at a young age. My hope is that this project will be an ongoing educational program, which will help change the face of aging.

## **Leadership Influences**

Originally I felt this project would be part of my organization’s structure and would use our website and board. But in collaborating with my design team, which consisted of leadership from my organization, our public relations firm and the Fellows on my team, it was decided that creating a nonprofit will have the most impact and appeal, not only locally but nationally. My hope is that this project will have a far-reaching effect and enable all organizations to educate people of all ages on the effects of ageism and how to make positive changes.



## Turning Points

A turning point during the formulation of my Action Learning Project was when I presented my original idea to the Fellows on my team. My original project was what you might expect: an intergenerational program that involved collaboration with a local school. This would have been easy to complete and would have benefited our residents. But what was missing was a passion for the project. When I casually presented my “Vintage Is Beautiful” concept, the team agreed that this is the project I am supposed to do. I just need to follow my heart.

## Growth Through Learning

My involvement with the Leadership Academy and the action learning process has helped me grow as a leader. I have reaffirmed and re-energized my passion for the work I do, not only for my organization but also for the field of aging. This opportunity is the most rewarding that I have been involved with. To collaborate with leaders from other organizations throughout the United States has given me the opportunity to strengthen my transformational leadership style, to continue to inspire team members and to be the best and most authentic leader I can be.



# FRANKENGLE

Director of Marketing

Friendsview Retirement Community, Newberg, OR

## BIO SUMMARY

I became Director of Marketing at Friendsview Retirement Community in 1999. In 2003 and 2008, Friendsview pursued significant expansions, increasing the resident population from 230 to 460. I was married to the late Patsy Engle and am the father of two college-age sons, Tim and Aaron.

# ***Regional Presentations to Address Resources and Affordability for Pacific Northwest Seniors***

## **Making a Difference**

Friendsview Retirement Community is a life-care CCRC begun by Northwest Yearly Meeting of Friends as a way to provide affordable retirement living for Quaker pastors/missionaries as well as its members and the wider community. An increasing number of these constituents are questioning whether they can qualify financially for Friendsview and seem overwhelmed with the options and long-term care issues seniors now face. This project will address those concerns by sponsoring regional gatherings that enable our constituents to better understand retirement options available to them. The gatherings will be customized by state and led by knowledgeable staff from Friendsview.

## **Leadership Influences**

Relationships with others have helped to direct this project. Originally, I outlined aggressive ideas for addressing affordability. However, in discussing the idea with my Leadership Academy team, my own marketing team and our executive director, it became more focused with a more promising outcome. For example, our marketing team had already identified regional gatherings as a method to strengthen relationships with our intent list of prospective residents and churches. However, with strong occupancy and an expansion project delayed, we searched for relevant content. Our executive director has already offered some “retirement 101” seminars and is happy to collaborate with me on this project.





## Turning Points

The first turning point centered on the question our cohort is addressing: what aging services gaps are out there? Originally the question seemed too overwhelming. However, identifying a specific gap that I care deeply about and outlining a way to address it has sparked passion. Another turning point was discussing the project with colleagues and finding ways to collaborate to make the regional gatherings a useful resource for those experiencing “the gap” by providing relevant resources and discussing options around the issue of affordability, whether at Friendsview or other venues.

## Growth Through Learning

This project is enhancing the leadership skills I am developing through the Leadership Academy. The quarterly sessions, including discussions led by the leadership team and our coaches, along with impromptu visits with other Fellows, have been relevant and dynamic. Discussing well-chosen books has been helpful, as have our site visits and leaders-in-residence events. Interestingly, the unexpected conversations with other Fellows offer many opportunities for growth. I have been challenged to reflect on specific gaps in aging services that I would not have considered which connected to my own action learning process.



# SUSAN ENRIGHT

VP Strategy & Integration

Provena/Resurrection Healthcare, Chicago, IL

## BIO SUMMARY

I am currently the VP of Strategy/Integration for Provena/Resurrection Continuum of Care in Chicago IL. I have been a Registered Nurse for 29 years with a background in acute and post-acute care in progressive management roles. I hold a B.S. degree in Nursing and a Master's in Health Administration.

# ***Post-Acute Nurse Navigator***

## **Making a Difference**

The “Post-Acute Nurse Navigator” is a redesign of how the continuum of care relates to acute-care hospitals. Instead of marketing to hospital systems for post-acute referrals, the nurse navigator functions in a collaborative role with the case management department, bringing an expertise in identification of persons who would benefit from various post-acute levels of care. The navigator also interacts with residents, families and physicians to outline the progression of care needs that would most benefit the person. This impacts my organization and its mission by improving care transitions for our residents and outcomes for hospitals.

## **Leadership Influences**

The relationship building required to implement the nurse navigator program has been the most time-intensive portion of this process redesign. Stakeholder groups such as the CEO, CNO/CMO, Case Management, and Continuum leadership group had to see the benefit of the redesign. Each hospital market was engaged in the process redesign and had input into the specific collaborative efforts and roll-out of the process change. Ongoing “system of care” meetings have been established to provide a way for communication and collaboration to continue successfully. The former liaisons were retrained and a few new positions were added to be successful.

## Turning Points

The biggest challenge has been the initial resistance to change from several of the stakeholder groups. A significant amount of time has been spent developing relationships to enable forward movement. Although the initial pilot showed success, it has taken much more time for stakeholder groups to embrace the process redesign. The turning point occurred when system leadership's expectations of improved collaboration were outlined.

## Growth Through Learning

The Leadership Academy experience has contributed to my growth as a leader by exposing me to new ideas and experiences in the field as well as increasing my knowledge of leadership theory and lessons learned. It has expanded my tool kit of leadership resources for working through challenges. The Fellows represent diversity in style and experience, which has assisted in developing the ability to work with and relate to people from other organizational cultures and viewpoints. It has provided time to reflect on my own style and effectiveness.







## PAMELAFOX

Chief Operating Officer, Twin Lakes Community/Lutheran Retirement Ministries of Alamance County, NC, Burlington, NC

### BIO SUMMARY

I am COO at Twin Lakes Community, a CCRC in Burlington, NC. Before joining the staff, I served as legal advisor and then as a board member for Twin Lakes. My husband and children agree with me that I am very lucky to be at Twin Lakes!

# ***Nurturing a Learning Organization***

## **Making a Difference**

I am working to engage all staff in accomplishing a shared vision of care for our residents. The continued success of our organization requires that we nimbly adapt to constant changes in legislation, technology, demographics, and economic forces that surround us. The delivery of high quality services that meet the needs of those we serve requires that we optimize all available resources. An engaged, fulfilled staff is essential to both these goals, and fostering staff involvement in addressing these issues will enhance the experience of both our staff and our residents.

## **Leadership Influences**

My mentor has supported me in seeking opportunities across our organization to involve staff in identifying areas for study and development. Staff have worked together across traditional hierarchical and departmental lines within our organization to collaborate on projects. At the outset, projects were identified by management and assigned to teams, but as the learning organization approach has evolved, new teams are forming and generating new project ideas and opportunities. Some of the original projects have been concluded, and others have taken new directions at the behest of team members.

## Turning Points

I am excited to observe relationships developing among staff members who previously have not worked together and to watch as teams have formed and synergies developed. The impact for our staff and community has been energizing and rewarding. Peter Senge's article, "Building Learning Organizations," gave us a name for our approach and helped provide some structure and reassurance that we were headed in the right direction. While the results have been exciting, we do occasionally have resistance to new approaches, but incorporating the resistance is part of the learning process.

## Growth Through Learning

The Academy has caused me to examine my views of leadership and to appreciate new and varied approaches. It has given me a renewed dedication to participative management in our organization. The Academy has also enabled me to meet and develop relationships with dynamic, diverse and dedicated colleagues from across the country; the opportunity to learn from and befriend the Fellows and coaches has been invaluable. Finally, the experience of visiting member sites and meeting local leaders during these visits has introduced me to inspiring new ways of delivering services in our field.







# ZELLGASTON

Chief Financial Officer

Elim Park Baptist Home, Inc., Cheshire, CT

## BIO SUMMARY

I serve Jesus Christ by serving my residents as their CFO at Elim Park Baptist Home. I have a CPA and count it a privilege to assist in this field. My wife (of 22 years) and I reside in Avon, CT, with our three teenage daughters.



# ***Integrating the Green House® Concept at Elim Park Baptist Home***

## **Making a Difference**

Our nursing home building is nearly 50 years old. Replacing one wing with a three-story Green House® style building with 15 private rooms per floor, a dedicated memory care unit and hospice would be welcomed by the Elim Park community. Also, residents would have an opportunity to join in the effort through fundraising. This project would broaden the services to our community and help fill some gaps in services to our seniors.

## **Leadership Influences**

Getting input from many parties will help make this project a success. While I have discussed this with my CEO and other management team members, I also plan on meeting with residents and front line staff to learn from their hands-on experience. Hearing from industry leaders at LeadingAge and other conferences about the Green House® model has also benefitted my learning. My Leadership Academy colleagues will be a key resource as I move forward as both a sounding board and rich community of leaders that have integrated or known other organizations that have experimented with this model.



## Turning Points

I have participated in several national LeadingAge and LeadingAge Connecticut conferences. I have heard, read and attended sessions about the Green House® model and resident directed care. In speaking with my Leadership Academy colleagues, they have shared with me their experiences and references. All of this has influenced the direction of this project. My goal is to provide as many services as possible in a cost effective manner and to engage more people with positive outcomes. By innovating our service models, we will be able to continue to keep Elim Park strong.

## Growth Through Learning

The opportunity to meet so many leaders from across the country has been amazing. I count it a privilege to be able to learn from their many perspectives. It has shown me that I need to step back, observe and listen to residents, staff and outside professionals. The interactive sessions and readings (I plan to read more!) were helpful in developing my leadership skills, and have affected how I lead major projects. I have also shared the concepts I have learned with the executive leadership team, in my staff meetings and in one-on-one sessions.



# NADIAGEIGLER

Associate Administrator

The Holmstad/Covenant Retirement Communities, Batavia, IL

## BIO SUMMARY

I serve as Associate Administrator of The Holmstad, a Covenant Retirement community, and home to 500+ residents. I have been with the organization and in long-term care for nearly 13 years and, after completing the Leadership Academy, am more excited than ever about the future of aging services.

## ***Extending Our Reach***

### **Making a Difference**

My project focuses on education and support of adult children, who are often key decision-makers during times of health crises in their parents' lives. By easing the burden of the adult child, we are working for the ultimate good of the senior. This project supports the mission of the organization as well as our newly created vision statement, which addresses the need to serve a larger constituent base, the importance of connecting into the larger community and our corporate desire to serve. I see this initial focus as the first step in a larger effort to serve the community.

### **Leadership Influences**

I met with stakeholders to discuss a series of questions related to the immediate goal as well as the long-term vision. While their input didn't shift the project significantly, it was important to hear them out, talk through areas of concern or confusion and receive validation that we were heading in the right direction. While this group of key stakeholders was given the opportunity to provide input and affect the direction of the project, ultimate responsibility for progress has been mine throughout. This provides clarity that does not exist when there is no defined leader.

## Turning Points

Reaching out to the stakeholders was necessary for progress. Their involvement led to a clearer, richer understanding of the vision for all involved. Early on, the gap between where we were and where we want to be seemed insurmountable. Setting the path was the only way to bridge the gap between what we were doing and what we wanted to do in the future. We still have work to do in this particular area but the progress so far has been encouraging.

## Growth Through Learning

I spent time in meaningful, thought-provoking and challenging conversations with peers, coaches, facilitators and friends found within the Academy. These conversations happened in a structured, scheduled manner but also organically - often outside scheduled meetings. The action learning process was the formal element that wove together the learnings from those conversations, from readings and from exposure during the site visits. Every ounce of energy our group expended over the last year has been an investment in our roles as a leaders. I am a better person and a better leader because of it.







# BARBRAGILES

Associate Director

Jewish Senior Life, West Bloomfield, MI

## BIO SUMMARY

I am the Associate Director at Jewish Senior Life of Metropolitan Detroit, where I have served passionately for over 15 years. In my position, I oversee six senior communities. I am also involved with our agency's strategic planning, visioning and new business development.

# ***Creating an Incubator for Ideas Through Innovative Partnerships***

## **Making a Difference**

I would describe my Action Learning Project as a think tank, an incubator for creative ideas and bringing forward generative thinking. I want to create a space for discussion and collaboration of both likely and unlikely partners from within and outside the field who have interest in advancing the future of aging services. I believe this project will make an impact and move the needle in our field, which will ultimately impact my agency and its mission.

## **Leadership Influences**

Many forces have shaped the direction of this project. A primary influence has been my Leadership Academy team, which has served as a collaborative coach for my thoughts and processes. Additionally, the Fellows have brought forward thoughts and ideas during our journey together that have given me further substance and direction. I have also been influenced by our site visits in which gems of experience have been shared openly and honestly. I look forward to building relationships with future partners and stakeholders as I move forward.

## Turning Points

Two significant turning points occurred in my action learning process. The first came when I learned from my CEO that it was not a requirement to have an immediate direct impact on our organization. If my action learning process made an impact on the field, this was of preeminent value. The second turning point came when I understood that it was acceptable to take time with this process. It is a big step to learn that not all problems need to be, or can be, solved immediately and that a better solution may arise when given more time for reflection and growth.

## Growth Through Learning

My experience in the Academy has contributed significantly to my growth as a leader. I have been exposed to readings, unique perspectives and concepts that have pushed me to lean into ideas in ways I could not have imagined. These opportunities have given me an appreciation for self-reflection and spending time with questions instead of answers. In addition, I have created a lifetime network of individuals whom I can call upon for coaching, guidance and support. This experience has become an invaluable resource for my entire life.







## SERENITYGREENFIELD

Marketing Manager, Production & Operations  
LeadingAge, Washington, DC

### BIO SUMMARY

I am a passionate strategic marketing professional specializing in nonprofits and have served as a Marketing Manager at LeadingAge for almost five years. Originally from Montana, I now live in Northern Virginia with my husband and two dogs.



# ***Making the Mission Real - Connecting LeadingAge Staff with Members***

## **Making a Difference**

The goal of this initiative is to bridge the gap between LeadingAge staff and our member organizations. One of the most valuable experiences of the Leadership Academy was the opportunity to learn about the different ways our members are serving their residents. Through networking and site visits, I feel much more connected to the work our members are doing and the passion they feel for the field. I hope to bring this opportunity to other staff members by creating a structured program around member visits. Staff will be given the support and resources to visit members more regularly.

## **Leadership Influences**

The support I have received from both members and staff on this initiative is amazing. Originally, I thought it would just involve creating a few opportunities a year for staff to visit a local member community. However, the excitement and support that I have received on this project has changed my vision completely. There are opportunities all across the country for staff to visit our members. Now it is just a matter of making the connections and helping staff recognize the value and importance of connecting with our members where they work and not just at conferences or professional events.



## Turning Points

The surprise for me, during the action learning process, was discovering the topic of this project. I did not know, when we first began, that I would become so passionate and excited about this initiative. I originally assumed I would create a project that was more in my defined area of expertise (i.e. marketing). But it soon became clear to me that bringing staff into member communities and building those relationships was really something I needed to focus on. Now I feel that this initiative can really make a difference for our staff and inspire their work in exciting ways.

## Growth Through Learning

This experience has taught me so much about myself and the limitations we all put on ourselves. After going through this program I can give myself more credit as a leader. I came into the Academy feeling completely out of place among a group of remarkable individuals. They have taught me to lead from within, to find passion in life and to take chances on things you truly believe in. All of these lessons I will take with me as I continue on my leadership journey.



# SUZANNE HUBER

Executive Director, Morningside Ministries at Menger Springs/Morningside Ministries, San Antonio, TX

## BIO SUMMARY

In 1997, my mom and I started a social work consulting agency serving home health agencies and nursing centers. I then joined Golden Manor Jewish Home in 1999 and was Executive Director when I left in 2009. I have since been Executive Director at two Morningside Ministry CCRC campuses.

# ***Morningside Ministries Advisory Committee for Ethical Practice***

## **Making a Difference**

Morningside Ministries is a 51-year-old agency whose mission is “caring for those who cared for us.” While we provide excellent care and are fiscally responsible, our organization has been lacking a permanent forum for staff, residents, families and board members to explore bioethical issues arising in our three CCRCs. We have now established a task force to research existing ethics committees in long-term care and formulate a Code of Ethical Practice. A future advisory committee will serve to enhance quality of life for all Morningside stakeholders through ethical education and analysis.

## **Leadership Influences**

The members of the task force are all well-acquainted and long-term employees. Because of mutual respect and trust, the members are able to engage in sincere dialogue about how the advisory committee should be structured. The process has also allowed us to delve into current issues that may need to be addressed by the committee and to explore which issues are not ethical but procedural. Although the task force members have diverse job titles, an *esprit de corps* exists around the urgent need to address the current climate of the Affordable Care Act, new readmission guidelines and market growth.

## Turning Points

A turning point for me in facilitating this task force was realizing the impact the advisory committee can have on our direct care staff. In providing all staff an ethical education and an environment in which their concerns about such issues as end-of-life care can be discussed, we will be enhancing their practice as caregivers while enhancing the experience of the residents. In addition, this committee will have representation from all campuses in order to amalgamate our opinions on issues as an agency.

## Growth Through Learning

My Action Learning Project is the result of putting into practice what I have been learning in the Leadership Academy. In order to be a transformational leader, one must be able to research, observe, listen, feel and coalesce before acting. These steps are similar to those required in ethical decision making. As I facilitate the plans and implement the full Committee for Ethical Practice, my experience in the Leadership Academy has certainly given me the tools to accomplish this important initiative. I have grown into a courageous and outspoken leader.







# CHRISTOPHER CHIEN

Executive Director

St. Paul's Towers/Episcopal Senior Communities, Oakland, CA

## BIO SUMMARY

I serve as the Executive Director of St. Paul's Towers, an Episcopal Senior Community. My first experience in this field was in 1999 when I served as a waiter at a CCRC and found joy and inspiration in that role. I have never looked back.

# ***Happy Employees Equal Happy Customers***

## **Making a Difference**

Our employees are among the most influential components to impact resident satisfaction. If “happy employees equal happy customers” then I believe we need to explore what we can do to create a positive work and residential environment. To further this mission, I will design a new break room that takes into account the wellness of the staff. I envision that this space will continue to strengthen St. Paul’s Towers workforce and create even more engaged employees who are proud of the organization and committed to our residents’ satisfaction.

## **Leadership Influences**

In the beginning, I had two possibilities in mind. I had initially decided to choose the project that I felt most aligned with my organization’s strategic plan. After meeting with our COO and CEO, they encouraged me to change my direction and follow my heart. This led me to focus my energy on creating an environment in which engaged employees are even more committed to resident satisfaction. I am fortunate to work for an organization that makes a significant investment in the human side of our community.

## Turning Points

At first, I wanted to organize the whole process myself. I soon realized that it would be beneficial to create a committee of equally passionate staff who could become invested in the outcome. The excitement generated by this group of energized individuals has brought new life to the project. By sharing a sense of ownership, staff have taken the lead on the project. It will be exciting to see where it goes.

## Growth Through Learning

This program has been one of the most valuable formalized learning experiences that I have undertaken. During my time in the Academy, I have discovered the importance of being not only active but equally reflective in my leadership style. I have also learned that being authentic in my leadership approach will guide me and the initiative in the right direction. The Academy has enabled me to find the “bright spots” in everything I experience.





# VENNITAJENKINS

Center Director

InnovAge Greater Colorado PACE - Cody Center, Lakewood, CO

## BIO SUMMARY

I am the Center Director at InnovAge Greater Colorado PACE. Previously I was the Administrator at The Granville Assisted Living Center for 13 years. I have my Master's in Business Administration.



# ***Communication Plan for Contracted Providers***

## **Making a Difference**

InnovAge has gone through a rebranding. The focus of my project will be an extension of the customer service aspects of the rebranding process. We are strengthening our relationships in the community with our partners through meetings and regular communication to support our mission, which is to provide seniors with services they need to age independently. My goal is to be sure that we close all the communication gaps that currently exist with our network of providers to allow a smoother transition for seniors as they move throughout our system.

## **Leadership Influences**

The many relationships that have been developed through this project have been amazing. Both our partners and participants feel more involved. And, our entire team is involved in making sure our customers are first and our participants are benefitting from that change. Also, the relationships I have developed in the Academy have enabled me to push the project in new and different directions, which is exciting for me and my organization.



## Turning Points

As I have gone through the action learning process, I have come across some shocking revelations that have caused me to rethink how I approach my work. The initial survey feedback gave me the opportunity to focus on what is important, seek information from my team, and rethink sustainability, replicability and participant satisfaction. This only served to strengthen what we do and how we serve our participants.

## Growth Through Learning

The experience in the Academy has helped me grow tremendously as a leader. It has taught me how to look for and coach those great qualities in other leaders as well as to listen. This program has taught me to be comfortable with my leadership style and to strengthen and support it by just being aware. There are not enough words to describe all that this program has taught me in the past year.



## D. BRUCE JONES

Director of Health Services

Vicar's Landing, Ponte Vedra Beach, FL

### BIO SUMMARY

I am the Director of Health Services at Vicar's Landing in Ponte Vedra Beach, FL. I am the North Region Chair on the board of LeadingAge Florida. I also serve as President of the Florida Chapter and on the national board of ACHCA. I am a surveyor for CARF International.

# ***Managing Change in a Stable Organization***

## **Making a Difference**

Vicar's Landing is a high-quality, stable organization with a large number of staff who have worked at the community more than ten years. In the past, the residents have been reticent to change anything about the community. New residents, however, have changing preferences and requirements. This project will seek to challenge managers and line staff to recognize and manage needed change in the community. Ultimately it will enable Vicar's Landing to stay on the cutting edge of CCRC providers and bring more offerings and flexibility to our residents.

## **Leadership Influences**

The relationships I have built during the Leadership Academy experience have shown me the immense value of and need for creativity and collaboration. I am very proud of the excellent care and services Vicar's Landing provides, but I want to continue to improve and implement best practices from other high-quality communities. The Academy has allowed me to build a network of leaders from different business settings, such as CCRCs, hospice and PACE programs, from all over the country. The environment allows for positive collaboration and exploration of new ideas.

## Turning Points

The thread of “change” within my project came, in part, because the project morphed four times as the needs of my community also changed. And, as the Academy visited various organizations across the country, I noticed best practices that would work well in my own organization. To integrate new practices, however, I needed to overcome the idea of “that’s how we have always done it.” This way of thinking can be detrimental to innovation.

## Growth Through Learning

I have been encouraged and trained to use tools that help me think outside my normal linear process. I am naturally operationally focused, so the readings and discussions have helped me learn to see the “big picture” and then figure out how to move in the right direction. I have also developed close friendships with colleagues that work in various settings across the country. Those relationships give me a wealth of knowledge and experience from which to question and learn. Finally, I have learned how to lead boldly with the right question in hand.







## J SCOTTJUDY

Senior Vice President of Operations & COO  
Masonic Homes of Kentucky, Louisville, KY

### BIO SUMMARY

I am the COO for the Masonic Homes of Kentucky and a graduate of the University of Kentucky. I am also a CFRE (Certified Fund Raising Executive). My passion for seniors comes from career choices and my family's involvement in the field for more than 30 years.

# ***LeadingAge Kentucky – Leadership Academy***

## **Making a Difference**

With the “silver tsunami” quickly approaching, we have to hone the skills of current leaders while creating an environment for others to join our field. Creating a Leadership Academy for LeadingAge Kentucky would allow participants such opportunities. Learning about leadership and applying the skills will be important, but equally important will be the trusting relationships acquired during the process. Selfless and trusting relationships are necessary ingredients with any challenging undertaking. If Kentucky is to meet future senior care needs, it can do so successfully only with cooperation and education.

## **Leadership Influences**

Someone once told me, “There is no such thing as you having a hole in your side of the canoe.” Simply put, that is the situation of aging services. Not only will each of our organizations be tested but also our field as a whole. Providing aging services to the single largest population segment in the history of humankind is a monumental task. The relationships I have developed have created a sense of obligation to advance the field. By doing so collectively, we improve each life served in our communities and the lives of all those seeking quality services and dignity in our state. Incorporating these practices in our organization will enrich the lives of the people who live, visit and work with us.



## Turning Points

Realizing the importance of taking dedicated time to step out of the daily routine for self-renewal, thoughtful contemplation, and experiencing other ways of doing things is not only good for individuals, but also for the communities they serve. Such times provide moments of clarity and inspiration. In more cases than not, we are providing often unwanted though necessary services in an ever-changing, always challenging environment. The issues become complicated, the challenges daunting. Reflection provides an anchor point for us to learn and improve for the most basic reason we got into aging services: to care for others.

## Growth Through Learning

Part of leadership is the investment in your own development – acknowledging that leadership is not an inherent trait but an acquired skill that takes consistent practice and self-awareness. The Leadership Academy is not a “how to” experience. It is a thoughtful journey that creates a yearning deep inside you to seek out other opportunities for growth while creating a sense of obligation to apply the skills you have acquired for the betterment of others’ lives.



# BRIAN LAWRENCE

President & CEO

Fellowship Village, Basking Ridge, NJ

## BIO SUMMARY

I am President and CEO of Fellowship Village and blessed to have a BS in Accounting, CPA license, Master's Degree in Business Administration and Nursing Home Administrator's license. Through God's love I dedicate myself to aging seniors, the mission of Fellowship Village, and my beloved family.



# ***Person-Directed Lifestyle Households***

## **Making a Difference**

My project is to transition our assisted, skilled nursing and rehab residences to Person-Directed Lifestyle Households. This will unfold through steering committees, action teams and continuously learning by our organization. Over time we will shift how we relate to our residents, and residents will rediscover their freedom of choice. In four years this transition will be complete and we will have renovated and expanded our health center. Fellowship Village will be a home where people who need our help can thrive, enjoy life, grow and be in fellowship.

## **Leadership Influences**

Relationships help me realize the extent of the gaps in aging services. Our consultants have given us tools and exercises to experience the profound gaps that exist in aging services and how our traditional settings of care have elements of hopelessness. Our teams are building relationships with one another, strengthening and compounding their impact exponentially. Watching these relationships blossom has confirmed for me that we are moving in the right direction. It is wonderful to witness our transformation as we begin to see residents as the individuals they are and not as their diagnosis or room number.



## Turning Points

I was not surprised that stepping back and “observing from the balcony” allowed others to step up to participate. I was surprised by who these participants are. I have taken time to be more reflective and to develop a greater degree of clarity through which I can see more deeply into others’ individuality, ideas and perspectives. Using this process has accelerated our community’s ability to understand that the ways we have delivered care for the past 40 years in our field are not the best and that together, staff and residents alike are getting excited about Person-Directed Lifestyle Households.

## Growth Through Learning

I feel I have a higher level and broader array of resources and tools to help me lead us through daily and long-term challenges. I have also gained a better understanding of myself, my beliefs, and who I am. I have a keener sense of awareness to understand others better. New relationships have taught me it is okay to show vulnerability and imperfection, and I have gained confidence by empowering others to take more control and responsibility. I feel that I am better able to connect with others on an authentic level.



# RACHELMAIN

Life Enrichment and Memory Care Director  
Elder Care Alliance, Alameda, CA

## BIO SUMMARY

For ten years I have served Elder Care Alliance in roles of Interim and Associate Executive Director, Memory Care Director, Music Therapist and, most recently, Life Enrichment and Memory Care Director. My passion lies in enhancing the life enrichment and wellness of elders and those who care for them.

# ***ARTZ is Artists for Alzheimer's***

## **Making a Difference**

The first step of my action learning experience is to develop ARTZ is Artists for Alzheimer's in my local community. ARTZ San Francisco will enrich the lives of persons living with dementia by providing opportunities to engage in meaningful experiences at local cultural institutions, such as museums and theaters. In addition to helping persons with dementia discover renewed purpose in life, my project will help to create public awareness and education about Alzheimer's disease. Open to all members of the community, ARTZ San Francisco enables my organization to provide services to elders beyond its bricks and mortar.

## **Leadership Influences**

ARTZ San Francisco has been a dream I have held for many years. Meeting with leaders in the field of aging inspired me to act boldly, take chances and persevere through the roadblocks. The gentle feedback of my peers allowed me to search within and identify my "true north" which feeds my passion, utilizes my best strengths and provides a sense of meaningful life fulfillment. I learned from my mentors the importance of making time to reflect, to maintain hold of the larger picture and to shape a path that moves my dream to reality.







## Turning Points

It appeared at one point that my Action Learning Project would not materialize. At the crossroad of opportunity, I made a decision to follow my passion instead of what others might consider a better path. I came to understand that by staying true and strong to my identity and calling in life, my mission will be realized (maybe not exactly as planned!). Transformation cannot occur in solitude. I have learned to surround myself with others who are strong where I am weak, to focus on my bright spots, and find lessons in the setbacks.

## Growth Through Learning

As I embark on a new leadership opportunity, I refer daily to the skills I have developed in the Leadership Academy. I am confident in my abilities to lead and implement a massive transformation within my organization. I have been exposed to a new world of inspiring leaders, opportunities to advocate for the field of aging, and an extensive support network of peers. This experience allowed me to reflect, creating a deeper self-awareness. I am renewed in my journey for continuous learning, making an impact, and leading the way in the field of aging services.



## CRYSTAL McCLOUD

Executive Assistant to the CEO & COO

Center for Elders' Independence (CEI), Oakland, CA

### BIO SUMMARY

I graduated from San Francisco State University in 2006 with a BA in Cinema and began working for CEI the same year. I started in HR, became the assistant to the chief operating officer, transitioned to the Intake Department and recently began working for the chief executive officer and current chief operating officer.

# ***360 Leadership Analysis: A Guide for Leadership Development***

## **Making a Difference**

My Action Learning Project will be a research paper or needs assessment for leadership training within my organization. I hope to better understand what gaps there are in order to create a successful leadership development program. With many transitions occurring over the next year, I will spend the next several months in research before moving toward development of the program. My hope is to have a program that current and emerging leaders in the organization can go through to replenish the pool of leaders in the organization and increase leadership diversity.

## **Leadership Influences**

The direction of my project has changed dramatically because of the feedback and insights of those I asked to help me with this process. Everyone is supportive of a leadership development program, yet due to transitions within our organization and timing I have scaled back a complete launch right away. More time will be spent studying the gaps in leadership training and devising a program that will best suit my organization.

## Turning Points

I have learned that regardless of the position in your organization there are insights that each person has to contribute. Being open to various perspectives has helped me to understand the needs of my organization. Challenges include being aware of developing changes and being able to question the norm to create something great. I was surprised by the support for leadership development and also confronted with the challenges I will face to get it off the ground. I have hopes for continual learning throughout the process and welcome the opportunity.

## Growth Through Learning

I struggled with knowing I would be the youngest Fellow in my class and that I lacked extensive experience in aging services. I hesitated in applying for fear of the unknown. The Leadership Academy has exposed me to new ideas and people and given me more confidence in my abilities while also challenging my thinking. I am more empowered to express my thoughts and ideas with current leadership in my organization and, in return, they have asked for my feedback. The Fellows have been encouraging and I have learned a lot from all of them.







# ANDREWMcDONALD

Vice President of Finance & Controller

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

## BIO SUMMARY

At ABHOW, I am Controller for 40 affordable housing communities and CCRCs. I previously served as a real estate development Controller and as a financial analyst at Arthur Andersen and Southern California Edison. I am a CPA, MBA from UCLA and graduate of Claremont McKenna College.



# ***Quantitative Analysis of Financial Restructuring Alternatives***

## **Making a Difference**

I am creating a financial tool to assist ABHOW with guiding an affiliated CCRC through financial restructuring. This Microsoft Excel-based model simultaneously forecasts the operational health and financial performance of the community, while quantifying the impact of alternatively proposed restructuring options, as ABHOW works with stakeholders to achieve a sustainable financial structure. This project will allow the organization to better negotiate outcomes that protect the financial interests of residents by quantifying and validating strategic thinking. The lessons learned during this reorganization can then be shared to potentially guide and instruct other organizations facing similar financial distress.

## **Leadership Influences**

Working with consultants and stakeholders of the affiliated community, the scope and complexity of the tool have been continually expanded as its efficacy is demonstrated and possibilities for increased utility are discovered. The robust framework of the tool has allowed users and stakeholders to propose increasingly multifaceted solutions that move parties closer to a sustainable resolution. Likewise, utilizing the relationships fostered in the Leadership Academy to contemplate more innovative possibilities for the tool has provided a diversification of perspective that has propelled the evolution of the tool into a broader spectrum of current and potential future applications.



## Turning Points

An important turning point in the action learning process has been better utilizing staff in the creation of the model, allowing me to see how leveraging existing technical and intellectual capabilities among my direct reports can both enrich their work experience and enhance the ability of my department to add value to the organization. It has enlightened me on the need to seek further opportunities to engage with staff and colleagues in different disciplines, as such collaboration taps into a depth and breadth of skill sets and perspectives that enhance the range of usefulness of the work product.

## Growth Through Learning

The Leadership Academy has prodded me out of my comfort zone, to seek and appreciate the varied perspectives of my colleagues, to allow myself to be vulnerable, and to create daily opportunities to engage in reflective quiet time, which has enabled me to make noticeable progress as a leader. I have been able to form strong personal and professional connections with the Fellows, who are of the highest level of talent and quality of person. The program has made me a more engaged listener, more humble leader, more dedicated advocate and overall better human being.





# HENRYMOEHRING

Associate Executive Director

Asbury Methodist Village/Asbury Communities, Gaithersburg, MD

## BIO SUMMARY

I am the Associate Executive Director for Asbury Methodist Village, a CCRC with 1,300 residents. I am a Licensed Nursing Home Administrator with 15 years serving seniors and have worked in hospital administration and physician practice management in the past with 30 years experience in health care.

# ***The Ongoing Development of Leaders***

## **Making a Difference**

Leadership development is my Action Learning Project. My experience in the Leadership Academy reaffirmed the value of ongoing leadership education and development. As our field wrestles with changes on the horizon, we need capable leaders to be successful. I'm committed to the development of these leaders. Leadership is a longstanding personal interest backed with formal training such as the Leadership Academy as well as experiential learning over the course of my career. I am focused on the impact I can have on leadership development starting in my community and growing to a national level.

## **Leadership Influences**

Working with the Fellows and mentors has been amazing. I have seen firsthand the value of effective leadership in organizations we have visited and discussions we have had. As I experienced this journey, it became clear that I need to have a greater commitment to and be intentional about the development of leaders that I can influence and over time develop ways to extend my influence as far as I can. This was not my initial project; after discussions with my peers and our team coach, I saw how I can make a difference with leadership development.





## **Turning Points**

I am involved in leadership development on campus as one of the facilitators of Resilient Leadership training for our 20 department heads. Through that training and the mentoring that accompanies it, I have seen growth in several of our leaders that has resulted in improved team performance. This real-time affirmation of the value of leadership training as well as my Leadership Academy experience has given me the commitment and energy to stay the course on the development of a mid- and long-range plan for future opportunities at the state and national level.

## **Growth Through Learning**

The Action Learning Project and Leadership Academy kindled a passion for the ongoing development of my leadership skills and the skills of those I influence. As a senior leader, I have seen how strong, effective leaders foster change, growth and progress. This experience opened my mind to new methods and practices, and more importantly helped me develop relationships with other leaders across the country. I learned to appreciate the diverse leadership skills in people and learn from them. I look forward to continuing this development journey long into the future as an alumnus of the Leadership Academy.



# ERICMOORE

Director of Dining Services  
North Hill, CCRC, Needham, MA

## BIO SUMMARY

I have worked in food and beverage for 20 years, owned a restaurant in Virginia, run restaurants on Nantucket and worked for the New England Patriots. I have been with North Hill in Needham, MA, for six years and live in Massachusetts with my wife, Trish, and two awesome kids.

# ***Hospitology: Creating a Culture of Character***

## **Making a Difference**

Hospitology: Our continuous study of excellence in hospitality and customer service out of respect for the relationship with every person we encounter. Hospitology was developed as a program to tap the core values of our community and establish our culture of service. We all begin as customer service representatives for our community, and starting with a “person-centered care” philosophy we extend that to everyone: guests, vendors, family, friends and team members. Hospitology was developed to create a model for my community and any other striving to create a culture of character of its own.

## **Leadership Influences**

People almost immediately encouraged me to think more globally about the program. Why develop a program that would only be about my specific community? Why not build the program with the idea that anyone wishing to develop a culture of service could use? I loved the idea. As the process evolved I was able to take it on the road and share the experience with other communities. The response was instrumental in the development of the program. Every Academy visit and educational session added another rich layer to the program.



An abstract background image featuring a mix of warm and cool colors. On the left, there's a dark, silhouetted chair. The rest of the image is composed of various geometric shapes and soft, blended colors like yellow, orange, red, and blue, creating a dynamic and artistic feel.

## Turning Points

There have been many important surprises along the way. Probably the most satisfying is the unexpected joy and happiness the program has brought to communities I have shared it with. I intentionally designed the educational presentation to be fun and engaging as a way to create buy-in and energy. When people stop and say they are excited to go back to work with smiles on their faces, fighting to hold the door open for each other, I know it has made an impact. I have been pleasantly surprised at how many people have said it reminds them of why they do what they do.

## Growth Through Learning

This process has generated a new-found confidence in doing the things that I am truly passionate about. I have learned my strengths as a leader can be used to make a dramatic impact not only on my community but other communities as well. The process of educating and presenting has awakened an old passion that couples with my enthusiasm for aging services. The Academy has taught me to open my eyes to leadership possibilities in the future and not to limit myself. It has validated my path. Think bigger, lead larger.





## RENATA OGRODNIK

Vice President of Nursing, Gene and Anja Rosenberg Hebrew Home and Rehabilitation Center, West Hartford, CT

### BIO SUMMARY

I am Vice President of Nursing at a 277-resident, long-term care community. I earned my Master of Science in Nursing Management from the University of Hartford in West Hartford, CT. I hold a Master's Degree in Organization and Management in Industry from Pstrowski Silesian Technical University, Gliwice, Poland.



# ***Organizing a Cohesive Director of Nursing Council in Connecticut***

## **Making a Difference**

There are over 100 not-for-profit long-term care organizations in Connecticut. A handful of Directors of Nursing attend the LeadingAge Connecticut DON Council. The purpose of my Action Learning Project is to organize a cohesive group of DONs. Together this group would share their experiences and discuss their ideas about serving our elders appropriately. I envision the DON Council not only nurturing, supporting and cultivating the new DONs but also coming up with innovative ideas about how to provide their communities with exceptional aging services tailored to the needs of each individual.

## **Leadership Influences**

I am excited by the number of relationships I was able to formulate throughout this amazing experience. During my many conversations with the LeadingAge Connecticut representative and other DONs, I began developing a great number of new collegial and personal connections. The nature of those conversations facilitated and formulated how the DONs want the council to work and what is crucial for our organizations in order to serve our populations. As “bright spots,” some of the enthusiastic DONs turned out to be extremely important and helpful in the development of this project.

## Turning Points

Not surprisingly, I have encountered some revelations and challenges throughout my learning journey. Much to my astonishment, all of these have greatly contributed to my overall learning experience. Many of my personal conversations with other Directors of Nursing helped me shape the way I approached the project. I have always been a very patient person, but during this experience I discovered other dimensions and meanings of “acceptance.” Although my Action Learning Project is in its infancy, I am confident that once in place and fully developed, it will serve both the DONs and our elders.

## Growth Through Learning

I am very grateful for this life-influencing opportunity. Both the Leadership Academy and my action learning process have contributed to my personal and professional growth. I have immense appreciation for the interactions with my colleagues, the design team as well as other leaders I have met. Their wisdom, insight and knowledge were at the core of my experience. I have always considered myself a “coaching leader.” The most important lesson, however, came through the concept of emotional intelligence, which I will keep in my heart and live by throughout my life journey.





## CHRIS OSBORN

Chief Business Development Officer, Evergreen Community of Johnson County/Evergreen Living Innovations, Inc., Olathe, KS

### BIO SUMMARY

I have served the field of aging for 12 years. I began as a Nurse Aide before obtaining my Bachelor of Nursing, Master of Business Administration, and Nursing Home Administrator licensure. I am passionate about my work at an innovative nursing home that is improving the way services are provided.

# ***Creating a Culture of Leadership Development***

## **Making a Difference**

My Action Learning Project focus is to develop a formal leadership program for Evergreen Community that grows current and future employees into leaders in aging services. This, in turn, will create a culture of leadership that attracts and retains passionate, driven individuals. I also hope it will encourage staff to find their authentic leadership styles and to find innovative solutions to challenges. This is a great fit for Evergreen Community's mission of providing the best possible services and educational opportunities to individuals in the field of aging services.

## **Leadership Influences**

The relationships I have developed with co-workers and partners have helped to expand the scope to create a richer more comprehensive leadership experience. Individuals will discover new perspectives by exploring our own organization, state associations and committees, and through other regional organizations. The program has also evolved to offer individuals the opportunity to discuss different leadership styles and structures with multiple levels of leadership.





## Turning Points

Through the action learning process I realized aging services as a whole needs to be more active in developing the next generation leaders. If we are going to attract, develop and retain staff, there needs to be an opportunity for growth. In the chaos of the typical work week, I have found we rarely take time, individually or as a team to reflect and discuss leadership and the impact we can have on the field. Through this program I hope to provide the opportunity for growth and development of leaders and to strengthen their passion for the field.

## Growth Through Learning

The Leadership Academy has been an amazing experience. It has helped me grow personally and professionally and given me a renewed sense of self-confidence. I have a true sense of my authentic self and feel I have found my voice. Additionally, the action learning process has improved my awareness and fueled my passion to make a difference and continue to seek out opportunities for personal and organizational improvement. The relationships I have developed in the Academy were a driving force in my growth. They will continue to be a contributing factor throughout my career.



# KEVIN PARRIES

Executive Director

Carolina Village, Hendersonville, NC

## BIO SUMMARY

I am the Executive Director of a CCRC in Hendersonville, NC. I have been with this organization for nine years and have been serving older adults since I was 14 years old. I am a certified Gerontologist, Assisted Living and Skilled Nursing Home Administrator.

# ***LeadingAge North Carolina – Leadership Academy***

## **Making a Difference**

The accomplishments of any organization can be traced directly to the combined efforts of everyone involved. It is the role of leaders to channel that effort into a guided direction. The LeadingAge North Carolina Leadership Academy's purpose is to bring concepts of transformational leadership to emerging leaders of aging-services providers across the state. The program seeks to transform aging services by identifying, developing and connecting the next generation of leaders. This creates a sense of individual empowerment – of having the tools, abilities and responsibility to take action for the betterment of themselves, their co-workers and the people they serve.

## **Leadership Influences**

Working with other dedicated individuals has helped me see this as not just a project, but an opportunity to develop lifelong relationships. Building relationships is a common theme throughout my journey and has proven important in my own leadership development. Collaborating with other Fellows has also enriched my time during this process. Our field is full of inspirational leaders and we all can learn from them. Using their knowledge and positive experiences has enriched my life and inspired me to do more to serve.



## Turning Points

As I started to work on my action learning process, my vision was clear from the beginning. I knew I wanted to provide the same opportunity to others as I was given by my own organization. The key to a successful community is a dedicated and loyal staff providing quality services. Most of the time it is the frontline staff who are not exposed to the same opportunities as upper management to increase their skills and abilities. The concepts, tools and readings have strengthened my own leadership skills, and I am ready to share with others.

## Growth Through Learning

My expectations have been exceeded way beyond what I could imagine. The relationships I have made both personally and professionally will be everlasting. The experience of the site visits and meeting the Leaders in Residence has confirmed my passion and career vision. The coaches and design team made the experience enjoyable and educational. They provided me with the fundamental skills to be a transformational and authentic leader. They taught me there are many forms of leadership and ways to providing loving and compassionate care to the residents we serve.



# BENPUCKETT

Executive Vice President & Chief Operating Officer  
Williamsburg Landing, Inc., Williamsburg, VA

## BIO SUMMARY

I have worked in senior living for 32 years, 23 at the Landing, helping the community grow through several expansions and new program development. I am active with Kiwanis and serve on several local nonprofit boards. I am married with four grown children.



# ***A Community-Based (At Home) CCRC for Williamsburg, VA***

## **Making a Difference**

I have launched an initiative to investigate the feasibility of a life care at home program in the Williamsburg area. The program would be consistent with our organization's strategic objectives to increase social accountability efforts, establish relationships with local neighborhood "village" networks, and support the aging in place movement. We have been encouraged by our contacts with stakeholder groups, including local nonprofit organizations serving seniors, funding organizations and neighborhood networks. I expect to see the new entity address gaps in services, encourage seniors to plan for future needs and bring various groups together in a collaborative fashion.

## **Leadership Influences**

The project has faced obstacles from potential competition in a small market area to healthy skepticism about financial feasibility. I have shared the vision for the project with our CEO, board members, consultants, community leaders in organizations serving seniors, and potential stakeholders (seniors in neighborhood groups promoting aging in place). Each has brought different and worthwhile viewpoints to the project concept. Although we are still in the exploration phase, I am excited to see the emerging potential of a true community-based program serving a broad spectrum of seniors and expanding Williamsburg Landing's mission outside its walls.



## Turning Points

It has been personally challenging but also gratifying to ask for, and receive, help from others, including my boss and peers. I have been able to test my skills championing a new idea, presenting it boldly yet with openness to other viewpoints. We are receiving calls from some of our initial contacts, asking to be involved as the program develops. I anticipate a turning point, after the initial phase of research and focus groups, when a determination is made about whether the program will be a community-based partnership or a traditional extension of our CCRC's existing programs.

## Growth Through Learning

The Leadership Academy has renewed my passion for the field. Exposure to colleagues from diverse backgrounds and the interactive, reflective approach have awakened my desire to find my unique style of leadership. Our organization has benefited as we have applied many of the learning exercises and materials to our leadership team and adopted more of a learning culture. The intense times of building deep relationships and breaking down barriers between life and work have drawn us out of comfortable world views and into an exciting new world of endless possibilities!



# SUZANNE PUGH

President

Aldersgate UMRC, Inc., Charlotte, NC

## BIO SUMMARY

For over 15 years I have served Aldersgate as Marketing Director and Operations VP. I was then honored to be selected as the President. I attended UNC-Chapel Hill and studied clinical psychology at UNC-Charlotte. I live in Charlotte and enjoy mountain biking, kayaking, camping and hanging with my son, Wyatt.

# ***To Boldly Go Where No One Has Gone Before...***

## **Making a Difference**

I am leading a team of board, staff, residents, consultants and community leaders through an intensive, integrated process of visioning, strategic and master site planning for our organization. We are establishing a roadmap of near-term and future plans to determine the best outcomes for this organization to be successful and sustainable in the years to come. Our goal is to honor the mission we have held for nearly 70 years while redefining what Aldersgate looks like in the future and measuring the impact of our work on the greater community around us.

## **Leadership Influences**

I felt strongly that we must have representatives from all constituent groups involved from the inception of this process, which has provided a level of transparency that has fostered an environment of trust. This has offered us the ability for frank, honest discussions, “everything on the table” idea sharing, the ability to challenge each other’s positions without offense and an overall spirit of being in this together all the way. The presence of these elements of trust is allowing me to lead this organization through a highly integrated and multi-dimensional planning process that has never been tested here before.









## Turning Points

The book *Presence* by Peter Senge, et al, inspired me to NOT start with a vision statement for fear it would limit our ability to imagine all the possibilities. We needed the mindset of “letting come” as we journeyed through the experience. I was surprised to get no resistance. Historically, we planned in a very linear fashion and I was challenging them to see the interrelationships and connections in processes versus snapshots in time, as discussed in our Academy work. And hearing *Switch* author Dan Heath say, “Every change looks like failure in the middle,” became my mantra.

## Growth Through Learning

I found that my leadership style in the initial months of this process was very tactical in nature. I’ve learned that I must engage in more reflective, holistic thought processes that challenge my typical problem solving, and guide the team through contemplative, creative paths to reach the most meaningful strategic decisions for the future. Through learning exercises at the Academy and a specific interaction with another Fellow, I reached this epiphany moment of self-realization that I can deploy tactics more effectively when integrated with this more holistic style of leadership. I see more transformative outcomes.



# DEBRA REARDANZ

President & CEO

Clark-Lindsey Village, Urbana, IL

## BIO SUMMARY

My career in aging services began in 1997 when I left the field of public accounting to join Clark-Lindsey, a CCRC serving 250 residents. I am currently its Chief Executive Officer. My previous roles include Administrator and Chief Financial Officer. I also serve as Treasurer for LeadingAge's state affiliate, LifeServices Network.

# ***Embracing Technology in Aging Services***

## **Making a Difference**

While the benefits of aging-services technology are well documented, the actual adoption by seniors at Clark-Lindsey has been unexpectedly slow. Our intention is to become the trusted liaison between the seniors, families and technology providers for our own residents and seniors in the broader community. We will provide the support necessary for seniors to feel comfortable adopting technology solutions. Our multi-disciplinary approach will allow us not to lose sight of the true purpose of aging-services technology: to improve the aging experience and maximize quality of life for the seniors we serve.

## **Leadership Influences**

Very early in the action learning experience, it became clear that the pace of change in the field of senior technologies is too fast for a single person to keep up with. It also became clear that the application of technologies for a senior's unique needs will oftentimes require a creative approach. For both of these reasons, a more team-based philosophy was adopted, including representation from several disciplines, residents and families. Not only can the team-based approach provide more creative solutions, but the team participants provide ongoing support and enthusiasm, becoming a champion for the technology.

## Turning Points

Initially, I was more narrowly focused on identification and implementation of technology solutions. As we further discussed the idea with residents, we found that the biggest barrier to adoption was not a lack of technical information, it was a sense of fear. We shifted our efforts to creating an environment where seniors can be unafraid to be curious and experimental with technology. In addition to involving the IT staff, we recognized the need to gain the support of social services, building services and other frontline employees if this new culture is to be established.

## Growth Through Learning

My most important role as a leader is to ensure that voices can be heard, particularly the voices of the people I am serving. I understand the importance of devoting my energy to fostering environments where people feel valued and unafraid to challenge the status quo. Throughout my time with the Academy, I have been surprised by the insight I have gained when I was challenged by the right questions. I believe I have learned to ask similarly thoughtful questions of others, and I am confident that this will help me to become a more thoughtful and innovative leader.







## LAURASNOW

Program Director, The Institute on Aging & Center for Elder Abuse Prevention, The Jewish Home for the Elderly of Fairfield County, Fairfield, CT

### BIO SUMMARY

I am in my fifth year as Program Director of The Institute on Aging. Our department supports community clients through care management, geriatric assessments and The Center for Elder Abuse Prevention. Prior to coming to the Jewish Home, I received a Master's in Public Health from Yale.



## ***Connecting @ Caring***

### **Making a Difference**

My project focuses on how our organization can better engage with the community about aging services. My role already requires me to partner with outside organizations in formal and informal ways. I hope to use those partnerships to foster new collaborations that will produce a dialogue that empowers families to make choices as their needs change. I believe the impact of this dialogue will not only help our organization prepare to meet the needs of families in innovative ways but also inform the aging-services field as it is challenged to meet the needs of different generations.

### **Leadership Influences**

Developing my action learning experience is truly the culmination of a year-long discussion in the Leadership Academy. As Fellows, we were charged with determining gaps in our field. The thought-provoking activities and debate allowed me to formulate my opinions. The project has provided a platform to wonder beyond the day-to-day “to-do” lists in my formal role. While I have a large question at hand, mentorship through my fellow peers, coach and our CEO have provided me with a foundation upon which I can approach other partners to participate in this discussion.

## Turning Points

“One may lead, perhaps, with no more than a question in hand.” This quote, written by Ronald Heifetz in his book, *Leadership without Easy Answers*, has stuck with me throughout this year. It informs me when employees approach me with dilemmas. It teaches me patience as our coalition on elder abuse prevention tackles an immense topic. It inspires me as I look to my Action Learning Project and is a question that may be with me my entire career. So often leaders are looked upon for answers, but this author and the action learning process have taught me true leadership emerges from asking questions.

## Growth Through Learning

The Leadership Academy has challenged me to engage in group discussion, readings, site visits and introspection, and put the lesson of these activities into action. Through continuous and honest feedback from peers during this experience, I have learned to channel and focus my energy and have found a comfort and confirmation in my leadership style. Support from fellow members of the Leadership Academy, who share a common passion for senior services and hail from a variety of career stages, has particularly enabled my growth as I learn from their experiences and crucible moments.





## DAVIDURSO

Director of Marketing & Resident Services  
Kendal at Hanover, Hanover, NH

### BIO SUMMARY

I serve as the Director of Marketing and Resident Services, overseeing the Marketing and Admissions functions, Dining Services and Environmental Services. Prior to this role, I served as Director of Dining Services after working for Marriott and Sodexo managing corporate cafeterias in Boston.

# ***Kendal at Hanover – Serving the Broader Community***

## **Making a Difference**

I would describe my Action Learning Project as a journey toward community cultural change. As we make the commitment to social accountability and community service, we will need authentic leadership to be successful. This initiative impacts our mission, current and future residents, as well as those outside our walls. We are moving toward being “a vibrant and integral member of our wider community.” Over the months and years ahead our inward focus must shift so that we fulfill our expanded mission.

## **Leadership Influences**

It has been a delicate balance to find a path that generates excitement among staff and residents. With multiple perspectives, it is challenging to meld those interests into defined efforts that support our mission. I have gained an understanding of their vision and how it can be fulfilled within our efforts. Based on input from stakeholders, we have altered our direction several times. We are working collaboratively to build interest from within, while identifying new opportunities simultaneously. While much work remains, the foundation of our efforts has been established.

## Turning Points

Several turning points have caused me to reflect upon what we have learned in the Leadership Academy. I underestimated the level of interest and excitement that would be required to expand our community service efforts. I also did not fully grasp the dichotomy between the resident and staff interests. After our initial wave of excitement for community service with staff and residents, I realized it was going to require even more innovative approaches to build lasting support and get more people involved. These realizations have taught me that leadership requires creating a path that does not already exist.

## Growth Through Learning

The project has provided a challenge in which to apply the concepts we discussed in the Leadership Academy. Prior to starting the Academy, I was appointed to chair a task group on Serving the Broader Community. This has put me in a position to work with board members, residents and staff in a new capacity. The experiences, readings, discussions and team work in the Academy have provided me with the tools I need to be effective in this role. The Academy provided the opportunity to strengthen my leadership skills and build my confidence for the challenges ahead.







# ELIZABETH WEINGAST

Corporate Director of Clinical Excellence  
Jewish Home Lifecare, New York, NY

## BIO SUMMARY

I was attracted to the field of nursing over 25 years ago, as it embraces both the art and the science of care. As a Geriatric Nurse Practitioner now in an administrative role, I am honored, moved and challenged daily to ensure best outcomes for the elders we serve.

# ***Clinical Pathways: Creating an Interactive Tool for Residents, Families and Staff***

## **Making a Difference**

Clinical pathways have historically been used to map care based on “disease-driven” needs. In post-acute care venues they have become a way to document best practices for staff to employ when caring for residents whose care needs can be anticipated during their stay in the community. The aim of this project is to expand the concept of clinical pathways to a tool that is applicable as a roadmap for all post-acute care clients. The construct of person-centered care forms the foundation for an interactive tool that can be customized for each resident.

## **Leadership Influences**

The project has formed a framework for many projects it overlays. This has become apparent in my work with the Marketing and Communications Department and the Electronic Medical Record (EMR) workflow development. A “discharge planning kit” development presented itself as an opportunity to employ the concepts of creating a path to home as integral to the kit’s development to guide care. Working with experts in communications has created an improved framework for the clinical pathway. Simultaneously, workflow redesign driven by EMR implementation and the clinical pathway development have each influenced the design of the other.



## Turning Points

I have been surprised and thrilled to learn that bringing an overarching concept of communicating steps toward regaining independence with staff, residents and family has lent itself to the structure of tools to support clinical practice and best outcomes. That is to say, I have learned the importance of spelling out the intention of the clinical pathway development. Communicating purpose and not making assumptions about other's understanding is an essential aspect of project management that I will integrate into my leadership style.

## Growth Through Learning

An essential part of the success of the Leadership Academy program is that employers must make a statement of support for their participants. This has enabled me to have an impact in my organization as I hone my new skills obtained through the program. My approach to the action learning process has been influenced by exposure to the many leaders we have met who have shared what makes them successful and vulnerable as leaders. My commitment to the field of aging has been confirmed and strengthened through my experience with the Leadership Academy.





## HEIDIWONG

Director of Fund Development

Kin On Community Health Care, Seattle, WA

### BIO SUMMARY

I am the Director of Fund Development at Kin On Community Health Care. As a Chinese American, my desire to give back to the Asian community led me to join Kin On, a skilled nursing and community-based agency dedicated to serving Asian seniors and families in Seattle, WA.



# ***Organizational Culture Change Begins with Staff Engagement***

## **Making a Difference**

Staff engagement at all levels is essential for real organizational change to happen. My Action Learning Project seeks ways to motivate and prepare staff for changes ahead, while improving overall morale and teamwork. To begin this process, we conducted a five-day campaign called “Creating a Resident-Centered Home.” The campaign consisted of daily staff engagement activities and concluded with an all-staff meeting where we engaged in team-building exercises and small group discussions. All employees are encouraged to contribute their feedback and suggestions. The leadership team plans to create more regular opportunities to engage staff in meaningful dialogue.

## **Leadership Influences**

When tasked with instituting organizational culture change, I was overwhelmed by the magnitude of what this may involve. After brainstorming with two colleagues, the initial concept was formed. The idea further developed and expanded after seeking suggestions from other members of the leadership team. It was exciting to be able to try something new despite not knowing how it would turn out. Along the way, there were many logistical details that required discussions with other department staff. All in all, it was a great organization-wide effort that would not have been successful if I had to do it alone.



## Turning Points

I began the action learning process with two very different ideas in mind. My first turning point came when I decided to choose the project that was more open-ended, seemingly more difficult to visualize and implement, and beyond my day-to-day role. Not having a clear idea of how to tackle the project left me feeling a bit overwhelmed at first, but I knew this would help me stretch and grow more as a leader. This project also required me to work closely with fellow managers in a leadership role unlike I had experienced before.

## Growth Through Learning

The overall Leadership Academy experience has helped me become a more confident leader despite my age and little experience in aging services. I have come to realize that being a great leader does not mean you need to have all the answers. Rather, a great leader has the ability to engage and mobilize people to seek solutions by asking the right questions. I appreciated the opportunity to hear success stories and challenges shared by Fellows and other leaders. While each person's story is different, I am inspired to continue my journey as I seek my leadership purpose, my "true north."

## 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.



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



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## **KATHLEEN ANDERSON**

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A special thanks to Matthew Anderson for the photographs

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