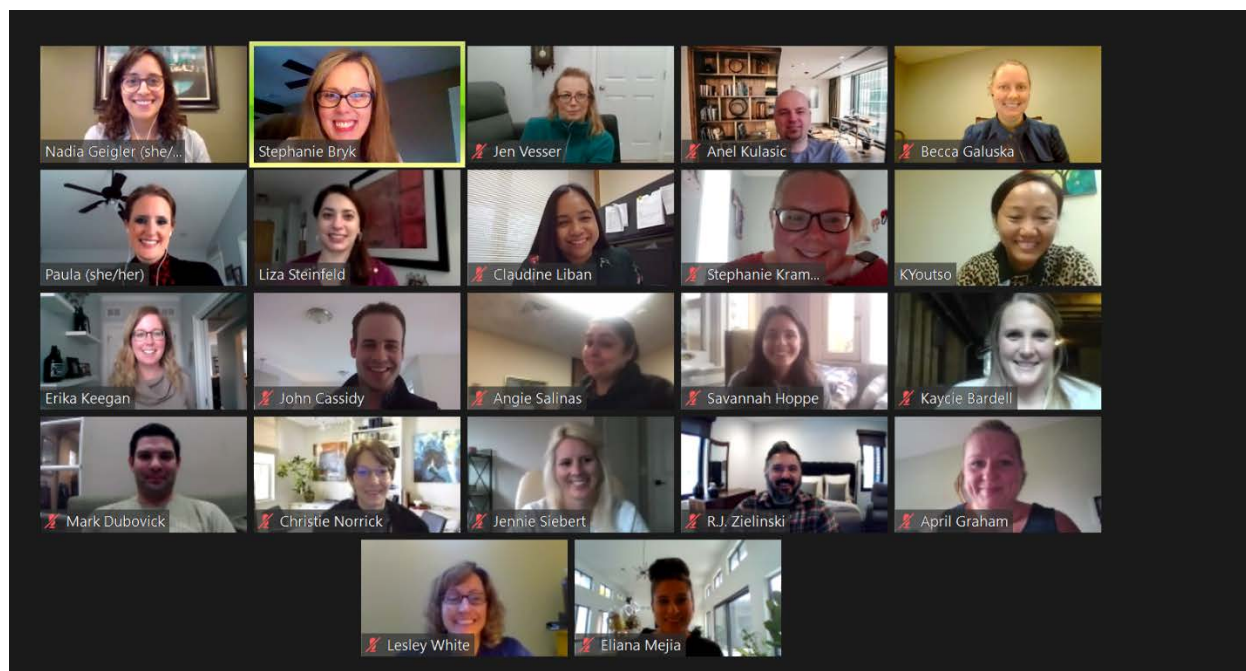


# LeadingAge Illinois Leadership Academy

*Creating a new era of excellence in aging services*



## Action Learning Process (ALPs) 2020-21

---

## *ACTION LEARNING*

---

Action learning is an adult learning theory based on the ideas of Professor Reginald Revans back in the 1940's in the United Kingdom. It is a learning-by-doing approach which encourages people to work together to solve a problem or improve performance. Importantly, the group spends time reflecting on what they are collectively learning during the process. The method stands in contrast with traditional teaching methods that focus on the presentation of knowledge and skills.

Each fellow was asked to create an Action Learning Process of interest to them and of benefit to their organization. As a leader, it is vitally important to learn how to facilitate the group process, and inspire/motivate others to achieve goals and improve quality within the organization.

Each fellow in Leadership Academy created a presentation that described what their Action Learning Process is, why they selected it, and how it benefits their organization. They worked with their coaching teams to provide and receive counsel, guidance and feedback. The presentations were made during session #4.

Here are the Action Learning Processes in alphabetical order by last name.

**KAYCIE BARDELL BSN, RN,  
EDUCATION COORDINATOR,  
THE VILLAGE AT VICTORY LAKES**

**Briefly describe your ALP and your reason for selecting it.**

Throughout my last 7 years of working in long term care, we have learned a lot about person centered care and the importance of getting to know our residents beyond their medical diagnoses and care needs. We have started that journey of culture change within my organization and are committed to caring not only for the medical needs but also the emotional, spiritual, and social needs of each person living with us. We have done extensive work on what information we need to collect from residents and families and have a process in place to collect this information as they move on campus. But we always come back to one main issue....how do we get this information to the front line staff? We know they are the ones that truly need this valuable information to care for our residents based on each resident's background, lifestyle, accomplishments, spiritual beliefs, and values. My ALP focuses on communication of this important information to the entire care team. I have formed a small team of management and front line team members to stream line processes and incorporate these conversations into our daily care discussions. We will also be educating the team members on how to use this knowledge to give the highest quality care to each resident.

**What long-term impact do you hope your ALP will have on your organization or the field of senior living?**

The culture shift across senior living has been happening over many years but we still have work to do. The goal of my ALP is to continue that journey within our campus and organization while making an impact on the quality of life for our residents and families when they make the move into senior living. By sharing this information collected and opening up these conversations, we will allow our front line care associates to be an active part of the team and help improve quality of care for all residents. We want our organization to be a place where our residents can drive their own care and live out their life with dignity. This has not been an easy culture shift but I hope with implementation of innovative and effective communication methods with our care teams, we will all become an agent of change to push this forward within our field.

**What leadership lessons have you learned as a result of working on the ALP?**

I think the biggest leadership lesson that I have had to use is how to appeal to the "why" of each staff member in this process. We are all here to care for our residents and it is easy to focus on their current medical needs. Through education and hands on activities, we are putting our associates in the place of a new resident so they can gain perspective as to what they want for themselves if they were ever moving into Victory Lakes. They will also gain valuable social skills that they will use while they are interacting and caring for our residents. If the associate has knowledge of the residents life prior to their move, they will be able to forge a relationship and gain trust quickly which will ease some of the anxiety and uncertainty of this transition. This kind of care also enhances job satisfaction for our associates and gives our residents the ability to make their own choices and have more control over their daily lives.

**What other observations or insights about your ALP do you wish to share?**

Often culture change is a long road with many bumps along the way but these little changes will make a big impact into enriching the lives of our residents. I hope my work on this project will inspire others to follow along on this journey. I feel that the lessons I have learned in Leadership Academy have put me in a position to be able to lead this team and push forward to achieve our overall goal.

**JOHN CASSIDY  
PROJECT DEVELOPMENT MANAGER  
COVENANT LIVING COMMUNITIES & SERVICES**

**Briefly describe your ALP and your reason for selecting it.**

My ALP is creating a centralized platform for the Facilities Management departments across our organization to easily access resources and tools needed to carry out their various responsibilities. Specifically, I aim for this platform to be an up-to-date computerized library of all the documents, plans, drawings, procedures, lessons, financials, and resources needed by our teams. When I joined the Facilities Department at Covenant Living at the beginning of 2020, I immediately noticed that our communities are filled with dedicated facility employees who work long hours, contribute with a servant's attitude and hold important hard skills needed to fulfill all that is required of a facility professional. When the COVID-19 pandemic began, I saw these habits and practices only expand in an effort to keep our residents safe. As a central office employee supporting these teams, I realized that our teams were often so busy helping their facility, that any new initiative, project, or protocol was never made available in a digestible or actionable way for our teams and as a result many of these items fell flat. There was a disconnect; no one needs more email attachments with long paragraph descriptions! In addition, I realized there are a lot of great resources that are going unused because the team is not aware that they are there for them. With that in mind, I realized I wanted to create a place that not just exists as one more place to find something, but gives our teams a first line of defense; a tool that empowers and helps keep everyone focused and organized while serving residents!

**What long-term impact do you hope your ALP will have on your organization or the field of senior living?**

I hope that this resource results in a more focused, organized, and efficient facility department at my organization! I truly believe in the idea that operational excellence is 1% strategy and 99% execution. In other words, we can lay out great ideas, impressive strategic plans, and brilliant cost-efficient initiatives, but not executing these ideas with digestible action plans, tangible resources and organized documentation for our dedicated, busy employees will only get us up off the ground; it won't get us all the way home. By creating this resource and consistently training on it, I hope that we can improve our execution as an organization just a little bit! In addition, I hope that doing the small, operational things well will open our teams' schedules and minds to forward-thinking, strategic ideas that can improve our organization's platform and offerings, as well as the industries' as a whole.

Even more practically and immediately, I hope that it improves our team's business acumen. If we can easily and accessibly lay out information and resources related to our organization then I hope that we can improve our keenness and quickness in understanding and dealing with situations as they come up, or at the very minimum, helping our teams know where to go when these situations do come up.

**What leadership lessons have you learned as a result of working on the ALP?**

During my experience with the leadership academy, one of the most important lessons I've learned is that being a leader is not about voicing your ideas and concerns first, nor is it about controlling everyone and everything. Rather, I've learned, it's about giving people the resources, space, and freedom to use their skills to succeed. I've also learned that it's about empowering people to complete work while gently steering the work in the correct direction by removing obstacles. With this in mind, while I was conceptualizing this ALP and beginning to execute on it, I feel that I've learned a lot about the importance of getting the simple, small things right. There are a lot of unused and unneeded clutter in our work day. There are also a lot of awesome ideas that never materialize. I struggled for a while with my ALP not being "flashier" or "more helpful," but I've realized that this project is giving our facility leaders resources and space and removing obstacles for them to do their job better. This ultimately brings me back to learning about the importance of execution in the life of a business and a leader. It's refreshing to see that small, little things go a long way.

**What other observations or insights about your ALP do you wish to share?**

I'm excited to continue this work. I hope that if I can empower our on-site employees by delivering centralized resources that can improve their acumen, save time in their day and ultimately improve their ability to focus on our residents, we will be all the better as a team, organization, and industry!

**MARK DUBOVICK  
HEALTHCARE ADMINISTRATOR  
THE ADMIRAL AT THE LAKE**

**ANEL KULASIC  
DIRECTOR OF FACILITIES  
THE ADMIRAL AT THE LAKE**

**Briefly describe your ALP and your reason for selecting it.**

We have identified an issue with the implementation of our EOP (Emergency Operation Plan). The EOP is a requirement for the skilled nursing portion of the community. Each community must have a plan and operating procedures for various types of emergencies or incidents. There are four components to the EOP; Emergency plan, Policies and procedures, Communication Plan and Training and Testing. As we discovered early on in the Covid Pandemic, staff training cannot be limited to just a portion of the community i.e. our skilled staff. This has resulted in us identifying a broader need for education and a need to streamline policies and procedures with other departments in regards to our EOP. We have decided to utilize existing communication tools like our employee app and Relias training software to identify current staff knowledge and understanding of our EOP. As we continue to utilize the existing tools mentioned we have decided that this is the perfect time to address the EOP.

**What long-term impact do you hope your ALP will have on your organization or the field of senior-living?**

In general, we believe that this process will increase the awareness, education and safety of our community. This also improves our ability to communicate to all of our staff more effectively. We also be using different features of our current software to use in staff education.

**What leadership lessons have you learned as a result of working on the ALP?**

We have learned that the ability to communicate to all of our staff across different departments and disciplines is critical. Gathering feedback and involving different disciplines has allowed us to gather a very wide range of different perspectives. This is an evolving and changing process and it is truly a team effort between the Healthcare Administrator and the Facilities Directors role. We have also learned the value of not working in silos as much of what is needed crosses various departments.

**What other observations or insights about your ALP do you wish to share?**

We have learned through the ALP process that even small incremental steps can have a big impact. For example, by providing the staff with more education, not only does this result in better outcomes, it will also ensure that staff is more informed and therefore will provide better feedback. This feedback can be used to shape future policies and procedures.



**APRIL GRAHAM, RN, BSN  
ASSISTED LIVING NURSE MANAGER  
FRIENDSHIP VILLAGE OF SCHAUMBURG**

**Briefly describe your ALP and your reason for selecting it.**

My goal is to improve interprofessional communication within Assisted Living to create a more efficient work flow and improve resident care and safety. I realized within a few months of my transition to assisted living that communication among direct care staff was not at my expectations and felt I needed to look deeper at why there were areas of disconnect so I could better understand and develop a process to improve communication among the team. The idea of communicating appropriately and efficiently may seem elementary however person to person interaction or efficient transmission of information demonstrated significant room for improvement. When changing from a social model living setting with non-clinical staff providing direct care to a social homeopathic model with licensed nurses available at all times, the direct care team grows and so the communication process needs to also expand. The process will include but not limited to: posting work assignments to take the guess work out of who is working where, designate specific phones to specific work areas for quicker communication to fellow care providers, adding scheduled team meetings including both resident assistants and nurses to build team work and trust, discuss shared responsibility for resident care and safety, and increase understanding of new expectations.

**What long-term impact do you hope your ALP will have on your organization or the field of senior living?**

Improving communication among staff will enhance team building, time management, and, most importantly, improve overall resident care. Providing staff with daily-shared information of work assignments and direct phone numbers of their assigned team will remove the unknown of who is working and how to contact them. Setting up weekly interdisciplinary staff meetings will allow Leadership, nursing, and resident assistants to communicate, learn and grow together as a team. Other impacts include redistributing workload for a better-balanced workday, adding more monitors to work stations throughout AL so all staff can have a visual quickly, improve response times for emergencies, and provide direct communication from staff to AL leadership.

I anticipate implementing this improved communication process will improve workplace morale, build a stronger team, enhance workflow and improve overall resident care.

**What Leadership lessons have you learned as a result of working on your ALP?**

The process of working on this objective has taught me numerous lessons. Still, the one that sticks out most is that the need for positive and efficient communication is vital in providing quality care and harboring a positive workspace for associates. Residents have to feel secure in knowing that the staff caring for them communicates appropriately. Staff needs to know that their Leadership and their peers hear them. Using the lessons of everyone having a voice has helped create better goals and understanding among the team. Utilizing the elephant and the rider really hit home with this process as well too because you truly need to incorporate the rider, elephant and design a clear path to get the desired outcome. Personally, the peacock



feather helped me focus on the big picture rather than jumping to make decisions on the now which helped me slow down to put the right puzzle pieces in place for superior completion.

**What other observations or insights about your ALP do you want to share.**

Thinking, planning and execution take time, trial and error and are often more successful with the help of a team rather than riding solo. Failure is ok if we chose to learn from our mistakes and improve to be more successful. One needs to keep in mind that everyone has a voice and opinion which may differ than yours but actively listening and incorporating other's ideas with yours can be a greater turn out than one's original plan.

Improving communication takes more than Leadership in a specific area. It takes the help of a team or maybe even a village (pun intended). Enlisting help from IT, Finance, Executive Leadership, and my peers outside of AL. I am reminded "We are all in this together" and this phrase/song applies to many areas of life and work-life balance.

**SAVANNAH HOPPE  
DIRECTOR OF FINANCIAL SERVICES  
BROOKDALE LAKE SHORE DRIVE**

**Briefly describe your ALP and your reason for selecting it.**

For my ALP, I chose to focus on growing revenue by department in our community and creating a better recording process for the goods and services provided. Due to Covid-19, our community began offering many complimentary services that may have accrued a cost in the past. This effected each department, the community's revenue, and the resident's expectation of complimentary services. As the Director of Financial Services, I wanted to create a clear process and expectation of what services will require an extra charge, to see that we are not crediting resident's accounts due to lack of communication. I've worked with our Dining, Engineering, and Housekeeping teams to create new price sheets and resident communication, along with new recording processes to track the goods and services being provided.

**What long-term impact do you hope your ALP will have on your organization or the field of senior living?**

Prior to Covid-19, we were charging these good and services, but did not have a clear process of doing so and did not have clear communication with our residents. I would like the process to be as seamless as possible, to eliminate the frustration for the residents receiving the charges, the associates that are tracking the sale or completed service, and the finance department who charges and credits the residents directly. My hope is that my ALP continues to be used in the community as a best practice and remains clear for those involved in the process later.

**What leadership lessons have you learned as a result of working on the ALP?**

While working on my ALP, I've used many of the leadership techniques we have learned and will continue to do so. So many times in the past, I've thought of a solution on my own, knew how I wanted to implement it, and knew I just needed key people to assist me. By using different leadership techniques, I've been able to take a step back and consider how I can involve others in the solution process and welcome their diverse opinions. This seems like such a simple concept, but it is often difficult for me to see things from different perspectives. While I'm considering solutions now, I try to think of different "hats", the Rule of Six, and ask for others to weigh in – especially those who I know will have a completely different outlook than I. I believe that everyone's voice should be heard and respected, as it can only strengthen the team.

**What other observations or insights about your ALP do you wish to share?**

The ALP and Leadership Academy as a whole has introduced many concepts and techniques that have already shaped me as a leader and will continue to do so. In the past couple of months, I have already noticed a change in my thought process. The ALP has also showed me that it's okay to continue growing and changing a process. There does not need to be a definitive end, as it can be a benefit to continuously evolve it. I am very grateful for the opportunity to have worked with this Leadership Academy group, and to adopt the techniques taught to us, that will continue to strengthen my leadership.

**STEPHANIE KRAMER  
CORPORATE RECRUITER  
COVENANT LIVING COMMUNITIES AND SERVICES**

**Briefly describe your ALP and your reason for doing it.**

For my ALP, I chose to focus my efforts on reinventing and smoothing out the onboarding process for Covenant Living's central office. I chose to focus on this project for a couple of reasons, one to provide myself more insight into our HR processes at our central office post hire. As a recruiter at Covenant Living, I only see until the point of hire. Then the process is taken over by other individuals within the organization so part of wanting to take on this project was to see how the process was done and the other portion of the reasoning was to improve upon our processes to create a better candidate experience. The first 90 days are so critical when bringing on a new hire to set them up for success in their new role and by reevaluating our process and improving upon it, I wanted to help create a seamless transition for new hires.

**What long-term impact do you hope your ALP will have on your organization of the field of senior living?**

My hope for my ALP is that the onboarding process will continue to evolve with the organization from a central office standpoint and eventually transition out into our campuses. Right now, my focus is only within our corporate setting and rolling out the new onboarding plan at our central office. My hope would be that over time we would adapt enough and be successful enough to where we would feel comfortable to push the onboarding plan out to our campuses for them to use. My hope is also that it would help with the retention of our employees to help them to feel more acclimated to our environment, their team, and their new job. By creating a better sense of belonging and a higher comfort level within that first 90 days of employment, the hope is that they would stay with our organization long term.

**What leadership lessons have you learned as a result of working on the ALP?**

Over the course of the past several months, I have learned several leadership lessons. The first was active listening. One of the first steps I took in this project was to interview a handful of hiring managers to get a better understanding of what onboarding for their teams look like now, how they felt during their onboarding process and what they thought could be improved upon in the future. By asking a few simple questions and then listening to their feedback without interruption, I was able to obtain valuable information for my project which gave me direction on what to focus on changing in our process. I was also able to jot down any questions and follow up with those questions if they were not answered when they were done speaking their thoughts.

Another lesson I learned/applied from leadership academy was the tight loose tight concept. Because there are so many moving parts to onboarding with many different departments involved, it was very difficult to gauge who all should be involved and how much they should be involved in the process. By applying this concept, I was able to keep some people heavily involved because they truly need to be and keep others engaged as much as needed while making everyone feel they have a say and a part in the process.

While I learned so many different lessons throughout this process, the final one I want to touch on is the communication piece. I feel that in communicating with all the managers and levels

had its own unique set of challenges. It started with scheduling and being able to get everyone on the same page by proposing my onboarding project. It then went to communicating what the project is about and getting managers on board to speak with me and answer my questions for fact-finding. From there, it was getting buy in from the different department heads and making sure I was setting the successful path and guide them to that path to help me accomplish what I need to have done for a good onboarding plan. Finally, I learned a lot about how to react and respond when communicating with many different people. The tool that was most helpful when responding to anyone was the 5 alternatives tool. Thinking through different options as to how to respond is especially helpful when majority of these tasks are being completed virtually.

**What other observations or insights about your ALP do you wish to share?**

Overall, this project has been extremely insightful to how my role plays a part within my organization and it allowed me to learn more about myself as a leader. From the learning through the process of implementing a new plan to applying the concepts that were learned throughout academy, I felt that the ALP really helped to tie all of the ideas together that we discussed throughout our time together. Luckily, my project is ongoing so I will continue to apply my concepts and the onboarding plan continues to roll out within my organization.

**CLAUDINE LIBAN  
MDS COORDINATOR  
LIEBERMAN HEALTH AND REHABILITATION CENTER**

**Briefly describe your ALP and your reason for selecting it.**

My goal for Lieberman is to utilize the data that is collected through the MDS Assessments, to reduce the unnecessary use of antipsychotic medication and thus impact the Quality Measures, by improving the antipsychotic use percentages, whenever it is clinically indicated and safe for Residents.

The prevalence of antipsychotic use in long term care facilities is closely monitored at a state and federal level. The higher percentage of use can greatly impact the quality measures of a facility. At a Resident level, unnecessary use can greatly impact the ability of a Resident to engage in daily tasks. The use of antipsychotic medication, even when clinically warranted, will place the Resident at risk for experiencing side effects such as abnormal movements and sedation.

The selection of antipsychotic dose reduction was a partnership between the MDS Department, Director of Clinical Services, Assistant Director of Nursing, and Pharmacy Consultant, in recognition of the CMS (Center for Medicare and Medicaid Services) initiative to improve the care of Residents with Dementia, in Nursing Homes. However, as I partnered with our clinical leadership team, it is understood that the focus of lowering antipsychotic use is integral to the entire population of Lieberman. The leadership team also recognized the need to initiate and maintain a process towards reviewing and reducing the unnecessary use of antipsychotic medication use.

To improve the rate of antipsychotic use, I have partnered with the Director of Nursing and the Assistant Director of Nursing in tracking the monthly use of antipsychotic medication use. It starts with the MDS tracking of the percentages of antipsychotic medication use in the facility which is then reported to the Director of Nursing and Assistant Director of Nursing for tracking purposes. I have also increased the utilization of Carewatch, an MDS Management software tool that collects data to help with trending Quality Measures. Once these trends are identified, the data is used towards the Quality Assurance/Quality Improvement (QAPI) process.

The QAPI reports are completed monthly, with the goal of identifying Residents who are receiving antipsychotic, reviewing the clinical indication, and performing Gradual Dose Reduction with the guidance of psychiatry services and facility the pharmacy consultant.

For the purposes of this process, the clinical team focused on two aspects of dose reduction:

- 1) Firstly, the identification of Residents with no clinical diagnosis for antipsychotic use.
- 2) The second step is to perform a Gradual Dose Reduction with goal of maintaining that reduction whenever possible and when clinically safe for the Resident.

**What long-term impact do you hope your ALP will have on your organization or the field of senior living?**

The long term impact that I hope to achieve is to see an overall improvement in the process of performing a Gradual Dose Reduction of antipsychotic medication in my facility. Through the

partnership between the MDS Coordinator, Nursing Management, Psychiatry Services and Pharmacy, my goal is to reduce unnecessary use, thus helping to improve the quality measure for percentage of antipsychotic medication use.

During the course of this Action Learning Plan, the clinical team has seen an improvement in the process of Gradual Dose Reduction. It also built a strong Quality Assurance and Quality Improvement tracking methods. Using these methods, the team has created an implementation process that allowed us to identify Residents who are appropriate for a Gradual Dose Reduction, and partner with clinicians such as Psychiatry Services, and the Pharmacy Consultant to assure that the Resident can be given the most minimal effective dose.

Furthermore, the team recognized the need to improve the monitoring process following the dose reduction. It is my goal to continue to partner with my Director of Nursing and Assistant Director of Nursing to address the need for dose reduction within the long term care population.

**What leadership lessons have you learned as a result of working on the ALP?**

The experience I had with this ALP has taught me the value of an interdisciplinary approach to Quality Assurance. All too often, the Director of Nursing/Assistant Director of Nursing have been tasked with the monitoring and improvement process of any quality measures. This process allowed us to look at our approach, not just at a clinical nursing level but from all aspects of the patient care continuum.

**What other observations or insights about your ALP do you wish to share?**

The MDS Assessment can be utilized to track if the dose reduction has been maintained, and to recognize Residents who did not receive a dose reduction. As a team, we recognized that not all Residents will be appropriate or respond well in dose reduction. One of the few barriers to this initiative was that many Residents have been on their respective medications for a long time. The team recognized that the dose reduction may not happen immediately but nevertheless, the consideration for dose reduction must be made. The need for an interdisciplinary approach and consistency is valuable in maintaining the process that was implemented.



**ELIANA MEJIA  
EXECUTIVE DIRECTOR  
ASCENSION LIVING CASA SCALABRINI VILLAGE**

**Briefly describe your ALP and your reason for selecting it.**

The focus of this plan is to mentor and guide staff of all levels to prioritize duties according to residents' medical conditions and risk factors to prevent falls in the long term care setting during the COVID Pandemic.

As the COVID pandemic took a turn for the worse on its first wave in March of 2020, also did the increase of resident falls in the nursing home setting as well as falls presenting major injury. As the weeks went by and the restrictions kept getting tighter, symptoms of depression, anxiety, agitation and even weight loss started to appear as contributing factors to falls as well as the lack of group interaction, communal dining and staff oversight. Residents were not being visited by family and friends, group activities and simple hallway and dining room interactions with their peers and other staff were not happening, the non-pharmacological interventions to residents' behaviors had to be re-invented to match the new normal.

**What long-term impact do you hope your ALP will have on your organization or the field of senior living?**

I envision staff of all levels and departments aware of residents' health conditions, concerns and their environment. Staff conducting their work focused on residents and communicating with their peers freely as experts on observations made resulting in low rate of fall incidents in the long term care setting as well as the falls resulting in major injury when group oversight is not an option and other communal activities and family intervention do not happen organically.

**What leadership lessons have you learned as a result of working on the ALP?**

Education never ends, it is a culture and a conversation, regardless if the same topic is taught something new is always learned on both sides. Repetition and follow throughout are two things that staff complaint the most about but wish the most as it shows that the leader cares and learn the most from. Daily results and updates are needed when establishing a new culture regardless of setbacks or triumphs, staff want to know how they are doing and what they can do better when they know that they are contributing to a bigger goal. Finding your team motivation can take a few tries but it is worth the process as it drives the success of the project.

**What other observations or insights about your ALP do you wish to share?**

Committing the non-clinical team to the idea was very challenging. Convincing them of their value and contributions was an everyday exercise. A code "STAR" was created and called every time a resident fall occurred and available staff and managers were expected to respond and jot down observations of the environment, the scene, personnel, time of day, location and placement of different equipment, lighting, etc. once all the information was put together and shared they were able to see their valuable input and the reason for the creation of the code.

**CHRISTIE NORRICK, MSW**  
**PROJECT MANAGER AT THE LEONARD SCHANFIELD RESEARCH INSTITUTE**  
**CJE SENIORLIFE**

**Briefly describe your ALP and your reason for selecting it.**

I originally planned to deliver an evidence-based intervention to residents living with dementia at CJE's skilled nursing facility, the Lieberman Center for Health and Rehabilitation. I discussed my idea with my supervisor, Lieberman's Executive Director, and others with expertise in dementia programming. I chose this project because I believe implementing evidence-based interventions is sometimes easier said than done, and I wanted to learn first-hand about the barriers to delivering a program with fidelity. However, due to COVID restrictions, I needed to change my ALP. I worked with colleagues to make two virtual presentations using my Positive Approach to Care Trainer certification. One event was geared towards older adults in the community ("Normal Brain Aging vs. Pathological Brain Aging"), and one will be made for professionals ("Best Practices for Working with People Living with Dementia"). Each presentation was created for a specific audience, with their needs and preferences in mind (e.g. comfort with technology), based on conversations with my colleagues.

**What long-term impact do you hope your ALP will have on your organization or the field of senior living?**

The community presentation aimed to help older adults and their loved ones identify "red flag" cognitive changes as well as reassure people about normal changes. Raising awareness about the difference is important to help people seek diagnosis and treatment, if needed, and reduce stress and fear. For professionals, the goal is to increase skills to provide better care and support to people living with dementia. I hope that all event attendees leave with more knowledge about dementia and a better understanding of how to respond to it in their daily lives. 200 people registered to attend the community presentation, indicating that there is a large demand to learn about normal vs. pathological brain changes in aging. Evaluations from the program were very positive. I have been asked by two additional groups to share this information with their members in the future, which I will do. The event for professional development will be held in April and includes several interactive components (e.g. small group work in break-out rooms), which have been shown to improve outcomes for adult learners.

**What leadership lessons have you learned as a result of working on the ALP?**

The importance of listening to those who will be most greatly impacted by a decision was clear during this ALP. Before meeting with Life Enrichment staff at Lieberman to discuss my first idea, I met with several others who had information about dementia programming and/or who had previously delivered programs at Lieberman to ensure that I could best frame my project and receive honest feedback. Additionally, I learned that leaders need to prioritize overall needs and goals of colleagues and their organizations rather than their own ambitions. While I was more excited about my initial idea, I realized that it was not kind to my colleagues to try to push ahead with something that would have demanded more of their time and energy during the pandemic. It was more useful for me to fill an existing need (i.e. programmatic content) in such a way that

decreased the burden on colleagues so that they could perform their core functions with fewer distractions.

**What other observations or insights about your ALP do you wish to share?**

I am grateful to my supervisor for encouraging me to pursue an ALP that was exciting to me, instead of exclusively on doing something that needed to get done anyway. When I needed to pivot to a different concept, she suggested the ALP that I ended up doing because she was aware of CJE's need for high quality virtual programming. I think that this is part of good leadership – matching capacity with organizational need – while also supporting the professional growth and development of individual employees.

**V. ANGIE SALINAS  
APARTMENT MANAGER  
JUGAN TERRACE – LITTLE SISTERS OF THE POOR**

**Briefly describe your ALP and your reason for doing it.**

I decided that for my ALP, I wanted to implement a new form of interaction for my residents. I manage a senior independent living facility where we have been able to build a relationship with DePaul nursing students who do community-based service learning hours at our facility. The students come and do a variety of activities or host events with our residents. Due to the pandemic, we had to halt all in person activities. It has been challenging to try to keep residents upbeat, especially because most were afraid and had been isolating. To be safe and still maintain some social communication, I reached out to my superiors with the idea of using a portal (camera) to connect to our lobby television so that we could still continue to have activities with our residents and students “virtually”. We were able to do different exercise classes and sip and chats, remotely and safely. I was also able to get an iPad for use for our residents who wanted to connect one on one with the students and with other friends from the nursing home who some have not been able to see since the start of the pandemic. Communication is vital, it plays a major role in all our lives. It gave our residents the opportunity to still be able to interact with others, but in a different way. The ability to be able to offer different avenues for the residents to have connections is why I decided to do this as my project.

**What long-term impact do you hope your ALP will have on your organization of the field of senior living?**

My hope is that even though things may start to slowly go back to a new and different normal, the residents now have more options for socializing and communicating. In the long term some like the idea of a one on one connection, it’s a modern-day twist to being pen pals, while also being able to see someone not just hear their voice. Not all seniors have access to an iPad or are tech savvy so to be able to provide the opportunity to show someone how to use the device and see them connect with a friend and watch their face light up is very satisfying. The portal which is used also continues to provide fun sip and chat socials, a pet show and tell, or provide a quick and easy recipe a student can whip up in their kitchen from the comfort of their home and share with our senior residents. I do think we will continue to use these methods in addition to getting together in person.

**What leadership lessons have you learned as a result of working on the ALP?**

While working on my ALP a lot of coordinating came into play, scheduling activities that were normally done on site by the students and trying to be innovative now remotely. The most important lesson has always been taking care of the residents. Taking care of the elderly poor is the mission of my organization, The Little Sisters of The Poor. Through this project, I feel better equipped towards the goal of bringing this to fruition.

**What other observations or insights about your ALP do you wish to share?**

I think that some of the things I’ve noticed through observation is, -even if people are quiet or shy in other situations, and would normally participate in activities when things were in person, that they made the effort to engage in virtual events. I think they may have even felt more-free to really share but it still gave them the opportunity to be involved and not be closed off. For me to

be able to see that we can continue to do things for the residents to give them options and opportunities to stay healthy, be social, make connections and have fun is fundamental in communication whether in person or virtual. Life enrichment is so important. Their lives are so important. I am so pleased to be able to help them live to “their” fullest the life they have.

**JENNIE SIEBERT  
ADMINISTRATOR  
FRIENDSHIP SENIOR OPTIONS**

**Briefly describe your ALP and reason for selecting it.**

The goal of my Action Learning Plan (ALP) is to create and implement an effective plan to better manage the distribution and tracking of our Personal Protective Equipment (PPE). Due to the Covid-19 pandemic we as a facility are challenged with managing PPE effectively due to recent shortages and allocations that have been enforced from suppliers.

The industry has been faced with a crisis when it comes to maintaining adequate PPE throughout the past 12 months. It is necessary to be able to calculate a burn rate in which supplies are lasting to operate the building effectively and ensure that staff/resident safety is of top priority.

I first identified the need to implement a streamline tracking system when I came to Greenfields in October 2020. The supplies were stored in multiple locations making it very difficult to determine what the building had and how much of each item. This made it difficult to monitor when needed ordering more supplies depending on how quickly we were going through the items. We also needed to determine how much PPE we were going through on average depending on how many people we had in the building that were on isolation protocols.

By streamlining this process, it will allow any person to go and look at the tracking spreadsheet and they will then be able to determine how much of each item we have and when we need to order more. This allows the building to operate regardless of who needs to distribute supplies and allows purchasing to maintain accurate numbers of PPE.

**What long-term impact do you hope your ALP will have on your organization or the field of senior living?**

My long-term goal is for the system to be streamlined enough that anyone that needs to restock supplies or manage the burn rate of the items will be able to do so with the process that is put into place. The Covid-19 pandemic has taught us all to expect the unexpected and this will allow operations to continue regardless of what challenges we face down the road either with personnel availability, or allocations on supplies. We can ensure all staff and residents have appropriate PPE to maintain their health and safety which is essential to any operation.

**What Leadership lessons have you learned as a result of working on the ALP?**

While working on my ALP I have found myself utilizing many of the skills that I have learned while completing the leadership academy. This project required multiple departments including: Nursing, purchasing, building operations, administration, and the staffing coordinator. I wanted to ensure right away that the team was able to understand the “why” behind the purpose for doing this project. This increased the teams buy in with the project as they were able to see how it impacted not only the organization, but their departments specifically. This was a big undertaking, and each group was able to contribute something different to the process which allowed us to identify things that may have been missed without the perspective of all parties.



I spent a lot of time and energy throughout the process listening to others and making sure to take other people's perspectives into account. By allowing team members to express differing opinions, we were able to look at a problem from all angles and assess the best ways to move forward with the project. Including the other team members in the planning process was essential in the success of the programs. We were able to bounce ideas off one another to determine the best way to move forward as a group.

**What other observations or insights about your ALP do you wish to share?**

I found that when working with a team on this project it was essential to listen to everyone's opinions and to talk through the process before we jumped into implementation. Having different perspectives and styles of communication makes solving the ultimate problem easier because you are not just approaching the situation the same each time.

During this process I believe that the system that has been put in place is something that can be maintained regardless of whose responsibility it is to manage supplies and that the facility will benefit from the organizational flow that now exists.

**LIZA STEINFELD, LNHA, LCSW  
HEALTHCARE ADMINISTRATOR  
THE SELFHELP HOME**

My ALP was to introduce regularly scheduled Leadership and Executive Team meetings in our CCRC as well as the “Leadership Team” categorization. Our community currently holds daily “stand-up” meetings as well as subject-specific ad hoc meetings involving key team members. There are regularly scheduled meetings (weekly and quarterly) with our Skilled Nursing team members, but they exclusively focus on our healthcare residents. Identifying a “Leadership Team” might help some of our key personnel, who may not be managers or department heads, understand that they have the capacity to step into a leadership position when the situation requires. My original idea was for weekly Executive Team and monthly Leadership Team meetings. Upon discussion with senior management, we decided to start with a monthly Leadership Team meeting.

I selected this as an ALP because I thought it would help strengthen our team and open channels of communication. By having all leadership included in these meetings, we can better identify shared goals and hold each other accountable. The team members I had identified as “least engaged” were not participating in the daily stand-up. While this could be a “chicken-egg” scenario, I hedged my bets on the teamwork contributing to the engagement. I also would hear some people question what others did all the time. At the same time, some staff opted to share their to-do lists not because other need to know the information but to justify what they do. I thought that a specific meeting where people could share big projects (promote transparency), brainstorm (foster innovation) and follow-up (be accountable), would translate to a stronger, more committed workforce caring for our residents.

I think that many other CCRCs already have regularly scheduled leadership meetings. In fact, I think they occurred at our community in the past. As pressure has mounted over the years to do more to provide better outcomes with fewer resources, there has been an increase in specific mandatory meetings (e.g., Medicare reimbursement, Safety Committee, QAPI), a general meeting was eliminated. This contributed to more independent working with less emphasis on understanding issues and solutions on a global basis within the work force. I hope that return of leadership meetings proves to be valuable time spent and eliminate smaller meetings where possible.

This ALP has been a challenge. Team members I mentioned it to were turned-off by the idea of another meeting. A colleague brought up another project we have thought about - creating an employee council or employee working group, but we felt that it was not appropriate for a morning stand-up meeting. If we were to create a separate meeting, we would not include all leaders and would thereby miss valuable feedback. This was a perfect agenda item for a Leadership Meeting. By pointing this out, the colleague who had suggested the employee council started to “buy-in” to the idea of a monthly meeting. By doing this with a couple of our more vocal, admired department heads, I would be able to earn the others’ interest. I should add that I had consulted with the Leadership Academy Facilitator about how she ran facilitated productive and valuable cooperation and communication in her CCRC. I then created a proposal, complete with sample agendas and a memo to leaders at my community about the initiative.

Our meetings were supposed to begin in January but had to be postponed to February. At the time of writing this, they still have not begun. However, we have made headway on the “Employee Working Groups.” I thought about making that my ALP. However, my failure to date to garner enough support to start Leadership Meetings contains several lessons which I am still processing. For example, did I choose the right project during a pandemic when there are so many weekly meetings and in-services already? And did I convey the benefits of the idea well enough for my Executive Director to see the value?

**JENNIFER VESSER  
MANAGER OF INDEPENDENT LIVING  
THE VILLAGE AT VICTORY LAKES**

**Briefly describe your ALP and your reason for selecting it.**

For my ALP I initiated a Wellness program for our residents, based on the 7 Dimensions of Wellness; Physical, Emotional, Intellectual, Social, Spiritual, Environmental and Occupational. This program is titled, Wellness U. and is a weekly program offered via our closed-circuit television channel. I selected this as my ALP for many reasons. Most importantly, I wanted to promote a wide range of wellness opportunities which support the wellbeing of our residents. Often times we are focused primarily on health related issues; offering a program with an emphasis on each of the seven dimensions of wellness, not just physical health, would greatly benefit our residents. Secondly, I wanted to incorporate key departments across our campus to deliver presentations for the wellness program. At Victory Lakes we have departments such as, Dining, Pastoral Care, Life Enrichment, Fitness, and Physical Therapy with staff that have vast knowledge in their fields. Collaborating together to bring wellness programming to our residents incorporates a community feel and is a wonderful opportunity for staff and residents across campus to connect with each other; that in itself incorporates a significant aspect of wellness. Lastly, amid the Covid-19 Pandemic, it was imperative to provide additional support for our residents. The pandemic brought new challenges for our residents such as, isolation, interruption of daily living and constant changes that were occurring day to day. To date, Wellness U. has delivered programming on laughter yoga, the Mind Diet, COVID-19 information, a virtual therapy dog visit, fall prevention, information regarding telehealth appointments, how to utilize technology and much more.

**What long-term impact do you hope your ALP will have on your organization or the field of senior-living?**

My hope for Wellness U. is that it has an immediate benefit for our Senior Living Community during the COVID-19 Pandemic combatting the effects of social isolation, with a lasting impact on the overall health and wellbeing of all. I believe a person-centered approach with a focus on all aspects of wellness will continue to be an important part in caring for our residents in the field of senior living. Incorporating the 7 Dimensions of Wellness programming into the lives of our residents through the use of Wellness U., offers opportunities to improve health and happiness in mind, body and spirit. While our organization offers the typical senior living activities through our Life Enrichment Department, my goal for Wellness U. is to provide an additional level of support, education, resources and enjoyment for our residents. Oftentimes in Senior Living, the emphasis on wellness is from a physical health standpoint and importantly so, however there are 6 other notable areas that lend themselves to the overall wellbeing of our beloved residents. The well-being of oneself directly relates to a higher quality of life and so integrating the 7 Dimensions of Wellness into my organization's program offerings, I hope to decrease stress, reduce the risk of illness and injuries, ensure positive interactions and support the overall health and wellness of our senior living residents. At Wellness U. our motto is "Be Well, Be Happy, Be U" and my hope is that this motto continues to be shared throughout our organization enhancing the lives of our residents.

**What leadership lessons have you learned as a result of working on the ALP?**

I have learned many leadership lessons while working to design, plan and promote Wellness U. Building a team from the ground up provided a wonderful opportunity to utilize the teachings of the Academy surrounding the 6 Thinking Hats. During planning meetings and email chains to Wellness U. Committee Members, I saw Blue, White, Red, Black, Yellow and Green thinking hats all coming together to enrich the lives of our residents. I also had the opportunity to practice the Academy teaching of “Tight, Loose, Tight” which was beneficial as the leader of the project. It taught me the importance of setting clear expectations, allowing the team time to grow and develop, and then circling back to ensure progress was being made. Another valuable lesson learned throughout my ALP was “Shrinking the Change”. Big thinking can ignite fear of the challenge, which is why I utilized a method called “shrinking the change” to help my colleagues get on board with starting a new initiative; I took what they were all separately trying to accomplish and blended it into a new program. The foundation for Wellness U. was already there, we just needed to collaborate together to promote the 7 Dimensions of Wellness. We had the technology, we had the skillsets, we were creative, we worked well as a team, so our project for initiating Wellness U. did not need to start from zero; shrinking the change made the project seem doable and success was in our future.

**What other observations or insights about your ALP do you wish to share?**

Implementing my ALP over the course of the Academy has gifted me with the opportunity to practice Leadership teachings in real-time; for me this was an invaluable part of being in the LeadingAge Leadership Academy. Learning new things about leadership in each session was a significant part of my experience, and then to be able to transfer that knowledge into my ALP made an impact on not only me, but also my organization; as each session went by I gained new sources of knowledge which were beneficial to my ALP. I am thankful to the Academy for all that I have learned and experienced. I know that Leadership is a life-long journey and the LeadingAge Leadership Academy has given me a wonderful foundation to build upon. I am excited for what the future holds!

**LESLEY WHITE  
MEMORY SUPPORT DIRECTOR  
LUTHERAN HOME**

**Briefly describe your ALP and your reason for doing it.**

The ALP that I have selected to work on with my team at Lutheran Home is to enhance the living environment on the memory support neighborhoods throughout our continuum. I have chosen this as my ALP because, through my observations since starting at Lutheran Home, I have seen that we provide excellent clinical care and activity programming to our residents with dementia but overall, I feel there is a lot of opportunity to improve the environment within our memory support neighborhoods that will better meet the specific needs of our residents with memory loss.

My goal is to create an environment in our memory care units that supports our residents with dementia and helps them to maintain their abilities and remain as independent as they are able. I plan to work with various leaders within my community to identify areas of opportunity within their departments related to our dementia services and to implement appropriate and agreed upon changes that will specifically benefit our residents within the memory support continuum to assure that both their physical and psychosocial comfort is maintained.

**What long term impact do you hope your ALP will have on your organization or the field of senior living?**

The impact that I hope my ALP will have is two-pronged. The first is that I hope the changes that I implement to the memory support environment will create a living environment that supports our residents with dementia at their highest level of independence. This in turn will help to moderate the impact of memory loss, functional impairment and general cognitive decline.

The second hope is to increase and retain our memory care census. There are numerous dementia care communities in the area around Lutheran Home, so families of individuals with dementia have many options to choose from. My goal is for Lutheran Home to be the top choice for dementia care by providing the most up-to-date specialized programs and services for our residents, along with the quality care we already provide.

**What leadership lessons have I learned from working on ALP?**

While working on my ALP I have learned that holding others accountable is not always a comfortable thing to do to when you are working with co-workers at the same level as yourself. It can be easier sometimes to just do things yourself in order to get them done quickly or the way you think they should be done, but a leader needs to trust other members on the team to do their part and to call them out when they are not holding up their end and to determine why they are not doing their part and help them to get on track. Another piece to holding others accountable that I have discovered is that in order to get buy-in from others to work on a project such as this and to make changes to the status quo, is that they needed to understand not just what we need to do, but WHY we need to do it. Providing the why statement is a crucial step when attempting to get others on board with a new concept or project that they may not understand.



In addition, I have learned how important it is to take time to recover my energy periodically when working on a project like this that involves so many people and so many moving parts. It can become mentally exhausting to consistently be keeping track of who is doing what, where each piece of the project stands and to find alternate solutions and make adjustments when something is not working as you thought it would.

**What other observations or insights from your ALP do you wish to share?**

The Leadership Academy has allowed me to grow both personally and professionally. I have learned a lot through this process but one of the biggest things I have learned is how important it is to involve others when working to make big change within my organization. As leaders, we so often think we know what is best for our communities but through consensus building, we can find other innovative ways of doing things which might work better to meet the needs of our residents and team members.

**KALSANG YOUTSO  
ADMINISTRATOR  
THE OAKS AT BARTLETT**

**Briefly describe your ALP and your reason for selecting it.**

My ALP is about diversity, equity, and inclusion (DEI) in healthcare, specifically in senior living. Senior living is a field with a diverse workforce with people from a variety of backgrounds. However, unlike other healthcare organizations such as hospitals formal leadership positions and programs in DEI seem to be extremely rare in senior living and/long term care. Additionally, when we talk about DEI this discussion should include the residents as well and the evolving diversity we see in that population. So, it behooves us to learn more about this topic. Doing so will not only increase our awareness but will also empower us to be compassionate toward all that we serve.

**What long-term impact do you hope your ALP will have on your organization or the field of senior living?**

In the long-term, I hope to encourage other leaders (both formal and informal) to be more open-minded and celebrate our diversity so we can make senior living a more inclusive and equitable field for all. I hope for organizations to make DEI an integral part of their culture not just as a business case but because it simply is the right thing to do.

**What leadership lessons have you learned as a result of working on the ALP?**

Numerous leadership lessons come to mind, some of which I will share here. When starting an initiative such as this you are going to have different perspectives, so getting a consensus from all appropriate stakeholders will be key. Additionally, you also have to know what your values are as an individual contributor and as a leader. I am intrinsically driven toward servant leadership and finding meaning in my work, so the ALP aligns perfectly well with those values. Like-minded members of the team who prize diversity and inclusion will be more likely to engage in this process. As a leader, however, I need to assess reasons for disengagement from others because it is my opinion that those who may seem disengaged or indifferent toward an initiative have something important to teach me as well. Additionally, as discussed above, DEI initiatives in senior living organizations seem rare at this time. Therefore, one major leadership lesson and/or challenge I am ready to embrace is this: how am I going to make the *Switch* so others see this not just as a valuable but also a necessary tool in today's world?

**What other observations or insights about your ALP do you wish to share?**

As I started working on my ALP I learned quickly there were not a lot of real world experiences to draw from in senior living as DEI programs are rare. So, it was not simply not enough to interview colleagues in the field or browsing online for articles that spoke to this subject. Reaching out to organizations that already have an established program was necessary to be able to build a framework for this initiative. Additionally, I wanted to see what the academic world had to offer on this topic, I was curious to learn about theories and ideas that can help an organization looking to create an environment where people prized diversity. So, when I enrolled in an online class on this subject it was very encouraging and fun to see that my cohorts were from so many different countries. And what I have been learning has been eye-opening. I am excited to see how all these aspects of my ALP will come together. At the end of

the day, I believe that success in areas focusing on diversity, equity and inclusion will positively impact the *entire* organization not just those few individuals directly impacted by them.

**RICHARD J. ZIELINSKI  
DIRECTOR OF FINANCIAL REPORTING  
FRIENDSHIP SENIOR OPTIONS**

**Briefly describe your ALP and your reason for selecting it.**

As part of my organization's strategic plan, we committed to becoming a data driven predictive enterprise. With that strategy in mind, we have launched many new systems to better track data throughout our organization. The objective of this program is to provide leadership throughout all levels the organization with a single source of operational reporting to streamline the retrieval and effectiveness of the information being collected and subsequently reported. The work would be accomplished by leveraging our financial reporting software to act as a database for non-financial data as well. The database would not act as the system of record but would simply house the data for easy reporting and access. The main reason for choosing this project is it will allow for the data to be cross analyzed with other non-financial data coming out of separate systems and would allow for easier access of information by users that are not necessarily users of the source systems.

**What long-term impact do you hope your ALP will have on your organization or the field of senior living?**

The lasting impact that I am looking to benefit my organization is with a centralized system that will provide broader and easier access the information that is being tracked by these new systems. Competition in the industry continues to grow and legislation puts more pressure on providers to optimize the use of the resources they have. There are a couple things that I live by professionally that tie back to this concept directly. The first is the timelier we get information the more useful it is, whether this is financial or non-financial data we can react to things more quickly and ultimately move towards prevention and taking proactive steps to solve potential problems that may arise. The second is the more we can get out of data processing and into data analyzing the more effective the use of our time is.

**What leadership lessons have you learned as a result of working on the ALP?**

Setting expectations has been critical as a part of leading my team. This has been my largest professional undertaking to date and certainly has not gone according to plan but setting clear expectations out of the gate has set us up for success as we continue this project well into the future. Secondly creating a well-defined training plan and contingency plan for continuity of support for this program has been equally important. Having a diverse team comprised of individuals across every department and level of the organization has given me the opportunity employ the use of several of the leadership techniques that I have learned as part of the academy. The one that has proved to be the most useful has been consensus building. I certainly can only lay claim to being our subject matter expert as far as the software is concerned, understanding, and knowing what will enable them to manage their own business unit more successfully moving forward has been my greatest professional take away.

**What other observations or insights about your ALP do you wish to share?**

My familiarity with the software is where my comfort area starts and stops on this project. Choosing a project outside my typical comfort zone has given me the ability to stretch outside

what I do on a day-to-day basis and has opened my mind up to future possibilities & responsibilities outside of strictly financial data management and reporting. While the “project” portion of the ALP has a long way to go from here, having the academy tools to draw upon as we press forward no longer leaves me with a sense of anxiousness but with excitement as to what can be accomplished as a team.