



# *LeadingAge Illinois* *Leadership Academy*

*Creating a new era of excellence in aging services*

## **Action Learning Process (ALPs)** **2021-22**



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## ***ACTION LEARNING***

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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.

**BETSY BAUER, HUMAN RESOURCES MANAGER, CJE SENIORLIFE  
CATHERINE SAMATAS, DIRECTOR OF ENGAGEMENT AND INNOVATIVE  
PROGRAMMING, CJE SENIORLIFE**

**Briefly describe your ALP and why you chose it.**

**Betsy Bauer & Catherine Samatas:**

This year CJE SeniorLife is celebrating 50 years of service. Over the years the organization has grown adding many new programs and services. Its infrastructure has tried to keep pace, but unfortunately, silos formed. With the added strain of COVID protocols, the chasm between them grew. To address these silos, as part of an organization-wide strategic restructuring plan, the V.P. of People and Culture suggested the creation of a Culture Club with three goals in mind: to build trust, promote commonality and teamwork and increase engagement. Leadership had just begun to discuss who would take responsibility for getting the group off the ground when we stepped up to lead the project.

As the Human Resources Manager and Director of Engagement and Innovative Programming, we felt not only well suited to the task but excited by the prospect of being able to be a big part of the silo solution. To begin, we met to identify and discuss the organization's bright spots, the departments, and programs that weren't siloed and seemed to work well across the agency. It became clear that regular collaborative projects were an underlying theme to their success. But, we knew that this wasn't a possibility for all departments, so we decided to look a little deeper at each scenario and applied our newly gained skills to see if there was something that we had missed. That was when we discovered what we like to call the "heart" of CJE. This heart can best be described as a drive and commitment to CJE SeniorLife's mission. It was not only alive in these departments but fed regularly with positive reinforcement. This heart was the thread of commonality that we could use to stitch together the silos, build trust, promote teamwork and increase engagement.

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

**Betsy Bauer & Catherine Samatas:**

As a nonprofit mission-based service organization, we are only as good as the people who work for us. Attracting and retaining qualified staff who not only share our mission but who are driven to provide excellent compassionate care for others requires a healthy work culture. It is our hope that the work we do with the Culture Club will help to not only accomplish the design goals of building trust, teamwork, and engagement but will also help to create a positive and supportive culture that directly impacts retention and recruitment today and, in the years to come.

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

**Catherine Samatas:**

As a woman who finds it easy to engage with others, the project at first glance appeared to be straightforward. Armed with new leadership skills I was prepared to apply the lessons in

“Switch” and move forward with our agenda for change. It wasn’t long before I realized the added layer of challenges that come with leading a project across an entire organization. Betsy and I had identified the bright spots, we had a plan for addressing the rider and the elephant, but the challenges began as we attempted to shape the path. As we’ve learned, sometimes what looks like a people problem is actually a situation problem. The need to tweak the path to find new ways to open the lines of communication in our project is tied to a much bigger organization-wide project with its own timeline. It was in this aspect that I learned some of my biggest lessons in ALP process. During the development phase I employed the softball question technique to gather as much useful information as possible. I used the rule of six to examine the bright spots and to get to the core of these success. And through the use of the X-Model of engagement, I was able to identify an initial target audience. The tools I’ve learned at the Academy have helped me to breakdown a project in a strategic way that not only is well thought through, but that can connect on multiple levels to a wide variety of stakeholders. The biggest take-aways that I learned in the undertaking of my ALP have been: 1. That organization-wide projects must be able to withstand adjustments to timelines if they are going to succeed. 2. That clear communication is essential, especially when working with different levels of stakeholders. 3. That taking the time to listen to and recognize achievements is as important as getting the job done.

**What other insights or observations would you like to share?**

**Catherine Samatas:**

I have come to more deeply understand that before I can effectively lead others I must be competent at leading myself. That my role as a leader is fluid and that I have the capacity to constantly grow and evolve personally and professionally. That a big part of self-growth comes from being aware – of oneself and of others and my environment. And finally, that if I want to inspire and share my vision I must be both willing to listen and learn from others while at the same time maintain my integrity and empower others to do the same.

**DAN CARROLL  
REGIONAL CONTROLLER  
FRANCISCAN MINISTRIES**

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

Franciscan Ministries is the home office for multiple affiliated and managed senior living communities in Illinois, Michigan, Indiana and Ohio. Our objective in the finance department is to deliver timely and accurate financial statements to senior management at the home office and the senior living communities by the seventh business day of the month. In order to close the month timely, a number of items are needed from the community Business Office Manager (BOM). My ALP is to create a workbook of the different processes for the BOM to follow during the month. This would standardize the information received from them and create best practice. I would lead a group of individuals from the community and the home office to use best practice for each process.

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

The long term impact I hope with the creation of a workbook that standardizes process and improves information received. The timeliness of the financial statements provides the end user at the communities and the home office, financial information that can be used to improve financial performance. The BOM plays an important role in the finance department delivering timely financial statements. They are responsible for billing, collections, and accounts payable for the community. The Business Office like most departments occasionally has turnover. When a new person starts in the business office the processes would give them an understanding of what is expected from them.

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

Working with a diverse group of individuals from the communities and the home office to create best practice allowed me to use a few leadership lessons I learned in the academy. The first lesson learned is I have to be an active listener to be a leader. Listening to the people who work in the field to understand about their process gives them comfort that their being heard. Listening to the group to come up with best practice will create a process that meets the community and home office needs. Another lesson I learned is trying to get the members of the group to understand the "Why" in creating best practice processes.

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

While my ALP is still in the beginning stages of implementation I think the different lessons I have learned in Academy about effective communication will help my ALP become successful. As new BOM come on board, giving them the tool to be successful in their role should pay off in the timeliness of the financial statements to senior leadership and the communities.

**LAURA CENTRELLA  
RESIDENT LIFE MANAGER  
SEDEBROOK SENIOR LIVING**

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

A few years ago, my Executive Director (at the time my Administrator) and I had discussed the need for an adult day care at Sedgebrook. Back in 2019, it was a very conceptual idea and conversation. Then the pandemic started. With us starting to adapt to COVID being a new normal and going back to the way we used to do things, we started talking about the idea of this adult day program again. Sedgebrook is a Life Plan Community with 467 independent living apartments, 38 assisted living/memory care units, and 84 skilled beds. We are seeing that a lot of our residents are choosing to age in place. They hire caregivers rather than choosing to move through the spectrum. Those residents that are choosing not to move through the spectrum to assisted living, are not benefiting from the activity programming in independent living because it is too high level for those who do have memory deficits. This Adult Day Program would be beneficial to our residents and their families as well as our caregiving program.

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

This program will be beneficial to my organization as it will help with the navigation course within the community. I will be working closely with the navigator in the community. We hope to make this a program that will be beneficial to those with memory deficits who could attend long-term and get the cognitive stimulation that is needed to help prolong the effects of Dementia. We also hope to use this as a bridge program for those who are ready to move through the spectrum but not ready to make the move.

This program will be started as an uncertified social day program for Sedgebrook residents. In the long-term, I would love to work on getting our certification and opening it up to the community. This would not only be beneficial from a marketing standpoint for Sedgebrook but we could reach many more people in the community. Our health center, Radford Green, gets a high flow of rehab residents from the hospital. We are seeing that those residents are coming in with more significant deficits who could benefit from a program like this. Many of these programs shut down during COVID and haven't started back up, so this could be a great opportunity with the right formula to get something great started.

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

While working on this project, I have found myself utilizing many of the skills I have learned while in the Leadership Academy. I have built programs in the past but not to this extent – the program is just going to be starting in May. The navigator and myself have been meeting weekly to get this program off the ground. I have found that I have been using the concepts of assessing my 'why' and utilizing the tight-loose-tight since I've started working on this project. I will also be working with a whole new team and new people always bring different experiences and ideas to the table which allows me to open my mind much more.

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

Having the opportunity to work on this project, has brought me back to the roots of why I got into this work. I went to school for many years while gaining experience in skilled nursing communities. Serving a population that needs more support was exactly why I went into social work in the first place. The last few years I have learned more by jumping into different roles that I've never worked within senior living. I've gained a lot of insight and opened my mind to new experiences. Being given the opportunity to work with residents who have cognitive deficits is something that I'm excited to take part in. This ALP has allowed me to move forward on a conceptual idea and make it into a program that is fully operational.



**LOLA IDOWU, BA, RN**

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

The purpose of my ALP is to improve the medication management and administration for residents in Assisted Living and improve the process of medication reminder services provided by caregivers and nursing assistants. As I started to review the medication administration process, I realized that the occurrence of a medication error within the assisted living population was extremely likely, in addition to non-compliance with the regulations set forth by the state's governing body. Medication error is a preventable event that can cause harm or death to a resident. Medication error usually occurs due to human errors however it often occurs due to a flawed system to recognize potential errors. I selected this topic for my ALP because one of the major responsibilities of a nurse is to administer medication to a resident and any slight error can be fatal for the resident, a possibly license revocation for the nurse if the severity meets requirement of a revocation and litigation to the organization. Medication reminder is a service that is provided in Assisted Living for residents that can self-administer their medication, however due to mild cognitive deficits, staff reminders are implemented to ensure that the resident is taking their medications as ordered. Under the medication supervision or reminder service non-licensed personnel can only remind the resident not administer, I realized that we sometimes get into a situation where the staff are administering the medication because the residents do not have the capability to independently administer the medication.

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

The importance of safe medication administration and management contributes significantly to the well-being of the residents and following the resident's medication regimen thoroughly ensures adequate management of the disease, which will in turn prevent polypharmacy within the geriatric population. There are some residents that are adamant that they do not require services such as medication administration by a licensed staff, however as a healthcare provider we are mandated to advocate for our residents, at times we find ourselves advocating to the resident about their own care, which can be challenging, however the outcome of the advocacy contributes significantly to the resident's quality of life. Ongoing review of the medication administration and management is required to ensure that the population we service receives the obligatory care even if it comes at a financial cost to the organization, meaning if we have residents that are resistant to safe medication administration and management, an internal process should be implemented to ensure the service is provided. The consequence for medication error is detrimental to all the parties involved, but the person that is most significantly impacted is the resident.

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

Change is inevitable and working in an industry that change remains constant, either by acquisition of company, within the workforce or within the consumer's population resistance is ever present and also secondary to change. I learnt that the implementation of change requires the involvement of the organization (including the residents) as a whole. I also learnt that people need to see the value of the change which will happen as a result of providing education and



the “why” factor of the initiation of the change. Applying the elephant and the rider analogy allowed an expansion on how to strategically initiate and implement change.

**What other observation or insights about your ALP do you want to share?**

Knowing that our residents and their families solely rely on healthcare provider to safeguard the resident’s well-being, the expectation for healthcare providers is to develop processes and implement the processes in anticipation of satisfactory quality of care, sometimes the implementation of change is difficult but residents and families recognizes that we are the experts and trust that we will implement steps to continue improving the quality and delivery of patient care.

**JULIE JUG**  
**LIFE ENRICHMENT MANAGER**  
**GREENFIELDS OF GENEVA**

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

My ALP was in conjunction with two other fellows in this Leadership Academy from GreenFields. The ALP project is called Transitions. GreenFields consists of Independent Living, Assisted Living, Memory Care and Skilled Nursing/Rehab. Having all four levels of care allows residents to transition through the levels of care as needed. Many times, residents ask/wonder what life is like at the other levels of care and what's included. There are many misconceptions which often lead to them being scared of the unknown if they do need to transition. Having worked in senior living for the past 13 years, this is a common feeling among residents in Independent Living. Our ALP focuses on opening the lines of communication about what to expect when it is time to transition and help clear up any misconceptions and answer questions that may be of concern. The end product will be a power point presentation given to the Independent Living Residents, allowing for Q & A.

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

As this is a common struggle among many senior communities, I am hopeful that GreenFields is able to utilize this ALP as a helpful tool on a regular basis/ as needed, as well as keep it updated with relevant information as changes take place in the community. It can even be expanded to having residents who have transitioned to other levels of care, be a mentor/guide/sponsor for those who will be transitioning. I am confident that providing education about the other levels of care will help eliminate some of the prejudice there is among the residents in various levels of care and encourage more of an acceptance and unity between them instead. Another thought, since I have taken a new position at a new senior living community, is that I would love to adapt this to my new community and provide the same benefit to these residents as this ALP has for the residents at GreenFields. As other staff move on to other communities, I am hopeful they will also see this as a valuable tool that they can adapt to their new community as well.

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

While working on this ALP with two other strong leaders in this academy, one of the lessons I have learned about was the behaviors of procrastination vs precrastination. I had never thought about this being a variable and what an impact it can have when working with others. Among the three of us, one is more of a precrastinator and loves to get everything done as quickly as possible. The other two (me being one) lean towards procrastination and are comfortable waiting until it's close to being due. Until we had learned about these qualities, I couldn't figure out why she was in such a hurry to get this done. It made me feel rushed, especially knowing how many months we had to complete it. At the same time, I did not know this was probably driving her crazy that we weren't getting too far too fast. In fact, we even had to put off a few of our scheduled meetings because of a few conflicts. Once I learned about our different styles, I

changed the timeline in my head and wanted to respect her need to have this complete. We set a timeline and had the end goal organized. She had also talked about understanding the opposite side and be patient with us procrastinators. It was an eye opener for all of us and the cool thing was we all balanced each other out. It was also interesting to see this as we worked with the rest of the leaders at GreenFields.

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

I moved to a new position at a new senior living community recently. I was able to finish my portion of the ALP but sadly, I was not able to be part of the final presentation. I am not able to give observations on the impact it had on the residents and if I thought it was successful and what we could improve upon.

I am grateful for so many of the leadership skills I have learned in the academy and being able to identify who I am as a leader now and where I want to be and even seeing how much I've grown since the beginning of academy. I feel like I'm a better me both personally and professionally and am excited to continue growing and learning. As situations come up at work with staffing and changes that we have to implement, I now have great tools and resources to help me along the way.

**DIANA KUNZE  
FACILITIES MANAGEMENT COORDINATOR  
COVENANT LIVING OF NORTHBROOK**

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

My Action Learning Process is to implement new policies and procedures that improve facilities processes for both residents and staff by using technology and innovation. A work order system is already in operation for facilities maintenance, our goal is to expand the use of this system into housekeeping, room reservations, and event set-ups. We plan to modernize the process for residents to request services from Facilities and other departments throughout the community and streamline how staff receive work assignments. Tech savvy residents will be able to submit work requests electronically and a work request hotline has been established for residents to leave voicemail requests as well. The event set-up process also needs a new process to ensure that correct information is provided to the staff in a timely manner for proper set-up.

**What long-term impact do you hope your ALP will have on your organization?**

The ultimate goal of this Action Learning Process is to enhance and increase resident and staff satisfaction and build relationships within the community. By creating new, interactive systems to request services, we hope to engage residents in these processes and promote a better understanding of how teams work together to serve the community. As new residents move into the community, we realize the need to integrate more technology for resident to use for those that choose to do so.

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

As I begin to work on this project and meet with people within the organization, we can all agree that we want to create rewarding experiences for residents and to help them live fully within all aspects of their lives. In "Switch: How to Change things when Change is Hard" I feel we learned great strategies to help implement change within our communities by directing the rider, motivating the elephant, and shaping the path. I also have learned a variety of ways to assess and deal with conflict, build trust, and develop strong relationships and teams.

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

Something that really surprised me during this project is how some staff members seem more reluctant to change than residents. Clear communication and direction will be important in helping residents and staff in seeing the value of the progress we are looking to make. The Leadership Academy has contributed to my growth as a leader by pushing me to foster my strengths and cultivate my weaknesses. The resources, support, and network of fellows I have gained through the Leadership Academy are something I hope to use throughout my career in senior living.

**SARAH MCCANN, RN  
DIRECTOR OF NURSING  
GREENFIELDS GENEVA**

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

The concept, planning, and delivery of my ALP was done in conjunction with two other fellows with whom I work. There was an immediate consensus amongst us that we wanted to focus on a project that would benefit our CCRC. We also wanted to incorporate many of the departments in the organization that are integral to the community. After reaching out to leadership at the community, our small group of fellows identified an educational program for independent residents that needed to be revived. This program focuses on providing residents with information about transitioning through the levels of care in the community. We felt this was important because many independent residents have a basic understanding of the process upon moving into the community but need reeducation after having been in the community for more than a year. Additionally, this education was presented by select department leadership in person, which gave residents the opportunity to ask questions. Ultimately we want our residents to feel supported and more comfortable knowing how the process of transitioning through the levels of care would look.

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

Our plan is to continue to have these presentations one to two times a year and continue to provide residents with the opportunity to learn about their community. Our hope is that this will be a permanent addition to our community programming that can be tailored to personnel and process changes in the future.

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

I have learned that each leader has a perspective and skillset to offer to any project. I enjoyed seeing the differences in our styles of leadership and approach to issues within our community. I have also developed a new appreciation for the importance of being flexible with meetings and deadlines in order to complete a project while also respecting each leaders responsibility to their departments.

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

Our group of fellows was able to successfully develop and present our program on transitioning through levels of care in our community on March 8, 2022. The residents that attended provided positive feedback and were able to take the information back to their families. We were very encouraged by this and plan to continue this program moving forward.

**MICHELLE ROTH  
WELLNESS COORDINATOR FOR INDEPENDENT LIVING  
THE ADMIRAL AT THE LAKE**

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

I identified the use and benefit of a device we have in our community and the potential opportunities it would bring within the community: Virtusense is a balance system that uses Artificial Intelligence and in under 3 minutes it conducts an objective, comprehensive balance, gait, and functional assessment to identify Fall Risk. Personalized clinical plans are then made for each individual depending on their evaluation. There are engaging games that target improvement in Balance, Memory/Logic, Cognitive Function, Endurance, and Flexibility.

Fitness: Not only could an individual be recommended to a specific class that would best suit their needs for improvement, it could potentially assist the instructor in what exercises are used in a class if a certain trend is seen amongst participants.

Therapy: Participants could have their results sent to their PCP for a Therapy Referral. Upon D/C from Therapy, this allows for a smooth process and continuum of care with Fitness.

Marketing/Sales: Virtusense could potentially be used for prospective residents who are looking to move into our IL community and we could assess their fall risk prior to moving in and then set up an individualized plan after move in.

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

Long-term, I hope that we could predict and reduce the risk of falls within our community and establish routine assessments to track mobility. It would also bridge the gaps between these departments to allow for a consistent routine of flow externally (perspective to resident) and internally (therapy to fitness or visa versa).

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

Working collaboratively with other staff, allows for each of us to define the “why” in this process. The “me” turns to a “we” and our visions and goals align when we allow each other offer suggestions and feedback on our goals.

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

Sometimes a process has hurdles or obstacles and may not be a linear pathway to arrive at the destination. Throughout that process is where education, communication, and motivation are key to hold each other accountable to continue and persevere.

**NAOMI SMITH  
DIRECTOR OF COMMUNITY ENRICHMENT  
MERIDIAN VILLAGE**

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

The project I selected as my ALP was to head up the team designing and rolling out Touchtown's Community Apps to our Independent Living residents here at Meridian Village. Offering new opportunities involving technology was (and still is) part of our strategic goals for the Lifestyle Enrichment department. Touchtown is a well-known provider of resident engagement tools. For approximately 7 years, we have utilized their dynamic calendar designing program, digital signage, and in-house TV channel capabilities. Adding on the Community Apps portion of Touchtown's portfolio of offerings was the next step in our strategic vision.

As implied, Community Apps is an engagement app that can be used on smart phones, tablets or desktops. It has the ability to offer residents information on activities, dining options, community information, phone and email directories, messaging and more. It was up to our team to work together to determine what the app should offer, who would update different sections in the app, and how to roll this out to Independent Living residents and get their buy-in.

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

In the short-term, our team is focused on educating our older adults on the benefits of this app, how to use it, and how to engage in our community using the app's capabilities (such as signing up for activities or submitting their own work orders). The long-term goal is to use this as a steppingstone (of sorts) to fuse technology into our culture. By getting familiar and accustomed to utilizing technology as part of the resident experience at Meridian Village, not only will we attract more active and tech-savvy older adults to our Independent Living, but also empower those who would not consider themselves "tech-savvy" to feel more confident using these services as well as understand all the benefits using technology can bring to their lives.

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

Throughout the entire process of this ALP, from initially planning of what would be included in the app, to building the app online, to the roll-out, many leadership lessons learned through Leadership Academy were practiced. During the planning and building (online) process I was the team lead, with other department heads on the team. To begin, I used the best practice of making sure everyone had an opportunity to share what they thought should be included in the app. Then, I made sure we all came up with a timeline together of when each step would need to be completed by.

To get the creative juices flowing, I began our initial meeting with the "WHY". I lead a discussion about the benefits this app could bring to our community, with everyone getting more and more excited for the end-product after we discovered "WHY" this app was needed and what all we could include within the app to help us achieve the goals.

Using Tight-Loose-Tight, I then shared (with major clarity) everything we had discussed, including commitments that were made. Trusting that the members of the team understood the



goals and what they needed to accomplish, I stepped back and worked just on the items I committed to. At the end of each process, we re-grouped and discussed the project.

I found one of the most challenging aspects of this ALP was holding team members accountable- especially when they are co-workers on the same managerial level as myself or higher. There were a few times such team members failed to meet a deadline we had all agreed to. It was my responsibility to hold them accountable and help them get back on track. I was purposeful in offering additional support to get the job done, but not offering to do the job for them.

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

Besides leadership lessons, this ALP helped me refocus on the importance of the interdisciplinary team. It is very easy to get absorbed in one discipline and move forward with projects without getting buy-in or suggestions from different departments. For this ALP, I worked with department heads from the business office, dining services, plant ops, lifestyle enrichment, recreational wellness and marketing. I truly believe this app is being embraced by our residents, in part, because it was designed with all aspects of life at Meridian Village represented.

**KAREN TOMKO**  
**COMMUNITY ENGAGEMENT MANAGER**  
**GREENFIELDS OF GENEVA**

1. My ALP was a presentation given to our Independent Living Residents about transitioning to health care (assisted living, skilled care, short term rehab, or memory care). I selected this because our community is now 10 years old. Many of our IL residents or their spouses are starting to need more care. Quite a few of our residents learned about the services offered in healthcare back when they signed their contract years ago but haven't thought about it since. This was a refresher to provide information to ease any concerns and answer any questions that they may have.
2. The presentation was presented as a power point that can be updated and changed when needed. It is a valuable tool that can be used every year. My vision is that this will be presented to our residents every year so they can get the most up to date information. After the presentation many residents asked for a copy to give to their children so they too would know all that we offer and how the transition process works.
3. I learned a lot of leadership lessons during this process. To begin with I worked with two other academy fellows – Julie Jug and Sarah McCann. All three of us work in different departments so finding time to meet required a lot of patience and flexibility. We also had to gather information from dining, housekeeping, life enrichment, marketing, life services, and nursing. I found the tight – loose – tight- strategy to be quite effective in making sure deadlines were met while still respecting everyone's extremely busy schedules. I communicated what I needed from everyone and by when. However, it became clear at our weekly community leadership meetings that many department heads were extremely stressed due to covid related staffing issues. That is when I had to be more loose and not nag or pester when I was worried about what seemed to be lack of progress. Instead, I did more "loose, no pressure" check ins to not only make sure folks were still on target, but to sincerely profess my gratitude for their willingness contribute to the ALP.
4. Throughout this process I really learned to trust my team. When we watched the Ted Talk on The Surprising Habits of Original Thinkers, I learned that I am a definitely "precrastinator". I like things done weeks before a deadline. I learned to trust and respect people who work differently than me – even if I would label them a procrastinator. I was also grateful to work with so many different departments. It opened my eyes to a variety of leadership styles and ideas that I will incorporate into my career as I continue to improve my own leadership skills.

**CAROL VAN BERKEL  
SOCIAL SERVICES COORDINATOR  
PRESBYTERIAN HOMES**

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

The plan for my ALP was to develop a welcoming and organized system to assist new residents to adjust to their new community. Our community had something in place, but we wanted to improve upon it. Each department has a wealth of information, but we wanted to develop a system to relay it to new residents in seamless way. This would take some effort upfront, so I needed to have buy-in from each department lead.

After identifying the project, the next thing was to discuss this with the staff who needed to write up the key services of their department that would be a part of their presentation to the new residents. Since everyone is so busy, I needed to explain that some effort at the beginning would help them in the long run. I did this by meeting with each staff member in small groups and learning from them about how they wanted to develop this. I drafted a template from their ideas. After each staff person returned their completed form, I made sure that each department's information was in the same font and font size on an easy-to-read single page and made it into a booklet. I scheduled a new neighbors meeting where each department lead explained their role and the summary of services provided. The booklet of their summaries was given to each new resident at the meeting. The new residents could take the booklet home so they could refer to it in the future.

As a follow-up to the meeting, feedback was solicited from the new residents and from the Resident Welcoming Committee. Overall, the response was very positive with minor suggestions which we incorporated before the next new neighbors meeting. The new residents were able to gain valuable information and a resource to have at home.

**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 hoped to achieve was develop a best practice of having an organized and simple process for the staff and a useful resource for residents. This information will remain valuable as the residents adjust to a new living environment but to also have a reference that they can look back on for months and years to come.

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

I learned that developing a plan was the first step but getting the support from the team of staff was the second step and the most essential part to this process. Overall, even though staff members are busy, they also have great ideas and want to be a part of team that works together toward a common goal. Even though the first draft and meeting were successful, it was only the beginning. By getting valuable feedback from residents, the booklet kept on improving.

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

I have learned through the ALP process that keeping an open-mind and being willing to change and add to the process improved the outcome. I also learned that while this project was initially for new residents, the residents who had been living at our community for a while also wanted the information in this format. This is an evolving process and it's important to go where the suggestions and feedback lead us. By asking open-ended questions that we practiced throughout my time at the Leadership Academy and focusing on listening and adapting, the outcome of this project improved.

**EDGAR VELAZQUEZ**  
**DIRECTOR OF ENGINEERING**  
**BROOKDALE SENIOR LIVING – LAKESHORE DRIVE**

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

Covid-19 has affected each one of us working in the senior living industry. Even though my concentration is in engineering and construction, we have felt the effects of this pandemic in the team. Being fully aware of how revenue loss has affected everyone, I wanted to contribute to my community by increasing rent-ready inventory to have available for the marketing team. I have chosen this massive project as my ALP because it has been a multi-process endeavor. The goal has been to increase available units in a significant way, while also providing higher quality inventory. In order to do this, I had to identify what skill sets were needed in my engineering team and subsequently recruit and hire personnel with these skills (drywallers, plumbers, painters, handymen, etc.) Once we had a highly motivated complete staff we got to work, I organized the entire engineering team into two groups. One group fully concentrated on upgrading vacant units into highly desirable units for rent. Then I proceeded to create a roadmap or plan for success, explaining to the team members the vision and the result of this undertaking. With this in mind, I checked the progress of the team every week and assisted in every way possible, sometimes assisting with logistical issues or even hands on. Even though every single unit has not been finished yet, we have completed a large majority of them in a timely matter. The plan is ongoing, but every week we are glad to meet or surpass marketing's needs and at the same time keep morale high in our team.

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

The impact of this process has already been noticeable. The new finishes and unit improvements have already received the admiration of other staff members and residents. Having high quality inventory for our marketing team also drives sales and allows them to feel empowered. The process has also benefited the Engineering team, as they know collectively the vision and can all work together and efficiently towards this goal. My hope is that this process can outlast me in the community and benefit the productivity of future engineering teams and continue to improve the community.

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

Working on my ALP and at the same time being in Leadership Academy has made me deal with others in my team and in the community as a whole with more compassion while still pushing for the common goal of improving our community. One important lesson that I have learn is to welcome conflict in a respectful way. This has not only allowed me to learn from others but has contributed to the growth and improvement of relationships with my peers.

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

I think I would share that an ALP has been a wonderful way to approach a massive project and break it down to more manageable mini goals. It has allowed me to learn that any project,

regardless of whether it is large or small, can be better managed if steps are introduced and implemented. The Leadership Academy has helped me to reflect on my leadership skills and given me the tools to continue growing as a leader. Many of the observations and techniques I have learned will undoubtedly shape my future methods. I am very grateful that I was given the opportunity to experience this wonderful training program.



### **The Force**

Diana Kunze, Lola Idowu, Julie Jug, Cathy Samatas, Carol Van Berkel, and Ron Wilcox (coach)





### **Marvelous Motivators**

Dan Carroll, Karen Tomko, Erika Keegan (coach), and Betsy Bauer



### **Authentic Allies**

Edgar Velazquez, Michelle Roth, Sarah McCann, Becca Galuska (coach), Laura Centrella, and Naomi Smith