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*LeadingAge*™ CA

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**Emerge 2013-2014**  
**Action Learning Projects**

**L**eadingAge California partnered with Sodexo and Masonic Homes to launch a third cohort of emerging leaders in the field of aging services. EMERGE is a comprehensive leadership development program specifically designed to better prepare future leaders within the LeadingAge California membership. The Class of 2013-2014 was comprised of high potential leaders across the state of California serving in different facets of Long-Term Care and who were seeking to transform themselves and their organizations.

The program was available to anyone who worked for a LeadingAge California member (including, but not limited to voting members as well as associate members), irrespective of position or work experience. It was far more important for Fellows to demonstrate potential within their organizations than it was for them to carry specific job titles. The Fellows chosen to participate met four times within the year which included visits to member communities, intimate conversations with leaders in the field of aging services and self- exploration of leadership styles through exercises and readings.

An important element of the program was the assigned Action Learning Project (ALP) in which fellows created an idea or acted upon an opportunity around the themes of change and innovation and brought that project back to their own organization or community. ALPs offer a chance to reflect individually and in groups where Fellows receive feedback and insight from their peers, mentors, and facilitators on how to successfully lead change through the work of their ALP. In the pages that follow, you will have the opportunity to view the work and learning process each Fellow took to cultivate or implement their project.

The Class of 2013-2014 Fellows were asked to explore the following questions related to their personal leadership skills, EMERGE program experience and ALP work.

- **Describe the capabilities you possess that make you an effective leader and your personal commitment to the field of aging services.**
- **Describe the perspective and knowledge you hope to acquire as a result of your participation in EMERGE.**
- **What is the title of your Action Learning Project?**
- **Briefly describe your Action Learning Project and why you chose it.**
- **What do you hope is the long-term impact of your Action Learning Project to your organization or the field of aging services?**
- **What leadership lessons were learned during the course of implementing your Action Learning Project?**



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### Veronica Arevalo

Assistant Director of the Oak Tree Lodge (assisted living)

**Mt. San Antonio Gardens**  
Pomona, Calif.

### In Her Own Words...

Before my EMERGE experience, I did not consider myself much of a leader in the true sense of the word. I supervised staff, but I never thought that I would be described as a *leader*. Today, I am proud to say that I consider myself a leader who likes to empower others to be the best they can be. Having a sense of oneself is incredibly important to become a great leader, and knowing how to treat others well and teach them to become great employees is just as important. Therefore, as a leader, I aim to motivate my employees and help them find their purpose in the workforce.

## Smooth Transitions versus 'Lost in Transition'

When you lose the literal meaning of a phrase from one language to another, the definition becomes nebulous and inexact. In much the same way, when an elder transitions to a higher level of care, many things (emotional, physical, spiritual) may become lost or seemingly, taken away from them (their independence, stability, sense of self, their familiarity, etc.). The elder may literally feel lost and experience instability in their new environment. It is my hope that my ALP will alleviate some of the stress and anxiety that often follows a move by empowering, not only residents, but also the staff. Staff will have a set plan to help in improving the transition experience of the incoming resident, resulting in the resident's happiness. The aim is to help residents achieve some, if not all, the six dimensions of wellness as described in the Whole-Person Wellness Model (Kang, Russ & Ryu): The dimensions are emotional, intellectual, social, physical, occupational and spiritual. By achieving wellness, residents will enjoy a long and happy life.

## Long Term Organizational and/or Field Impact

The long-term impact I hope my ALP has in my organization is to empower both staff and residents. Ultimately, I would like residents and their families not to feel distress in the moving process, but instead, to feel reassured that there are solutions to the problems that often lurk during change/ transitions. It will be a win-win situation whereby staff will feel that they were involved in the process and feel confident for their contribution and involvement; residents will feel happier; and residents' families will feel comforted that their loved one is in a caring environment.

In addition, I feel compelled to integrate the guidelines of my ALP into the newly built Green House® homes in our community. The logic of resident-centered care, whereby the care surrounds the resident and their needs come first, is more evident now in my community than ever before. Striving for smoother transitions from one level of care to the next should be priority and take precedence. The resident will be able to better cope, or better yet, defeat the inevitable emotions that are often associated with a move or change.

## Leadership Lessons Learned

Gaining confidence is one of the many leadership lessons I have learned because I am in the process of revamping the transition program from levels of care to benefit residents and families, as well as the organization. I felt empowered because in designing a program that will benefit the residents in my community I will also be giving back to my organization and improving (or enhancing) what is already in existence. In addition, I have learned that as I attend meetings I find myself observing and identifying the various leadership styles and approaches. I attempt to utilize the leadership approaches that I connect with most in order to stay true to myself. I want to continue to focus on becoming an efficient leader, one with passion and enthusiasm, while at the same time, encouraging others to excel, even in the most challenging situations. Also, I have become a better communicator with my peers and staff, and feel more comfortable with expressing my ideas and thoughts to them, while at the same time, allowing them to have a voice in all matters.



### Deborah Barrette

Resident Services Manager  
**Northern California Presbyterian  
Homes and Services (NCPHS) -  
The Sequoias**  
Portola Valley, Calif.

#### In Her Own Words...

One of my attributes that helps me to be an effective leader, is that I can be quite versatile. I When I began EMERGE, I had been in this field for four years and was serving in an interim position, supporting the community as they searched for a new director and manager in environmental services. In one aspect this worked well with my leadership style. Having grown up in a very small rural community, I had developed a style of servant leadership. We were all equal and were there to help each other do and be our best. This is still my approach, supporting the needs of my team and coworkers; but I had never visualized a goal for “our best” that went beyond completing the task. As I worked my way up through the ranks in my first career, profit was the focus and people were often the means to that end. The corporate vision had merit but was not one that stirred my passions. One of the first things I realized at EMERGE was that vision was also missing as I handled my transitional position in my new career.

As I am getting established in my new field, I find that working with seniors feels like “coming home” and that I want to use this new leadership opportunity to stay focused on the human element of the job! With so many regulations and safety requirements, the focus can easily be consumed with specific tasks and procedures, moving the bigger picture into the shadows. My time with EMERGE helped me to connect my values to my goals and then work from there to create a vision and a voice that will not only guide my decisions but also encourage me to take risks and think creatively when working with my teams. My style of servant leadership is fun again, but it now has more depth and opportunity for fulfillment.

## New Resident Orientation Program

My Action Learning Plan is a New Resident Orientation Program. I want to create and implement a comprehensive program that will address many elements involved in a resident's entry and integration into the community. The process will be developed by focusing on three key areas:

1. Creating a "seamless" move-in process. This starts with having the apartment ready by the move-in date and ends with everything in place for the first night's stay.
2. Ensure residents have accessible information resources relating to the ins-and-outs of the community. This includes an easy to navigate handbook, informative events, and access to communication formats.
3. Establish the means to evaluate and support for any social, psychosocial, or health need. This includes needs not just common to downsizing and moving but also related to events that might have been involved in the decision to move.

The creation and implementation of this process will involve all departments, residents, and resident committees. And, the desired final outcome will be a formalized plan that is flexible and has an element for continuous improvement, allowing it to grow and change with the community in the years to come

## Long Term Organizational and/or Field Impact

It is my hope that over the years to come this program will be an effective tool in establishing a new resident's comfort level quickly and providing them with a sense of confidence so they quickly become active members of the community, adding their personal experiences and viewpoints to the mix. It is also my hope to educate and engage staff in the challenges new residents face, and create a process that will easily flex to accommodate changes in staff and department structures in the years to come.

## Leadership Lessons Learned

I have only begun working with staff on the various aspects of the New Resident Orientation process, but I am already seeing the value in inserting team building exercises into our meetings. I've become more open to the differences in our thought processes and more open to the different approaches and viewpoints others bring to the table - confirming that even the "no-no's" improve the process. I am excited by the possibilities and look forward to continuing the teamwork needed to develop the processes that fulfill both the required tasks and bigger vision for improving the quality of aging, beginning when they first move into our community.



### Loretta Cecconi

Chief Clinical Dietician & Interim Food  
& Nutrition Services Director  
**Laguna Honda Hospital and  
Rehabilitation Center**  
San Francisco, Calif.

#### In Her Own Words...

I've had 23 years of experience working in the field of aging services and each day continues to bring forth new challenges. My commitment and dedication has given me a rich history of experience to step forward as a leader and advocate for the aging population. My passion for service has guided me through the necessities of loving, dignified, and respectful care personally through my Mom's terminal illness and ultimate death and professionally with daily direct patient care. My leadership abilities span throughout many areas of my job. Wearing multiple hats, as a member of the Executive team and as a supervisor managing frontline staff, I am in the unique position to be part of the strategic planning and vision on the executive level and to be able to implement and see direct results with my staff on the front-line.

The EMERGE program has changed my leadership skills by improving my perspective on how change can be implemented successfully. There has been great opportunity to network with others and learn about best practices in the field of the aging and disabled care. EMERGE is providing me with new guidance to carry a mission forward for my hospital as well as the community of San Francisco. As a leader, I am improving my skills of communication, listening, and collaboration which help me to grow and gain further insight into myself and my actions. EMERGE has impacted me by teaching me new skill sets and is enhancing my techniques to motivate and inspire others for change. EMERGE is helping me become a model for mentorship for the San Francisco community and an advocate for the aging population. I'm hopeful that I will gain strengths to guide me to make a difference in Health Care reform, future regulations for California, and through my local and state professional organizations as a Nutrition expert make a presence through public policy.

## Following the “Healthbeat” of Laguna Honda Hospital

Wellness is a choice to assume responsibility for the quality of your life. Good nutrition and healthy eating is the key to wellness and achieving high levels of well-being and life satisfaction. The nutrition message often gets blurred. By providing positive nutrition messaging and activities I expect to stimulate interest back to the basics of nutrition, cooking and flavor. Examples of this might include:

- simple cooking demonstrations
- hosting an ingredient tasting
- exploring cooking on budget
- providing lists of free cooking classes in the local community
- using a variety of herbs and spices to make food tasty
- follow results of the “Healthbeat” over time (BP, BMI, inches lost, how your clothes fit, energy levels)

These initiatives will promote wellness, good nutrition and healthy eating and this is my inspiration to “pay it forward” for the community of Laguna Honda Hospital.

## Long Term Organizational and/or Field Impact

The impact I would like this project to have is to create positive, easy to understand, nutrition messaging so that the community of Laguna Honda Hospital embraces higher levels of well-being and takes personal steps to improve on their life satisfaction. This project will also help to contribute to the continued expansion of our wellness program offerings within the hospital. It is also my vision to help broaden the definition of what nutrition means by showcasing our talents as Nutrition experts. Through exposure to our field of Nutrition and Dietetics, we promote our educational backgrounds and value as a key component of the wellness team. My nutrition and wellness project will help the hospital community focus on improving their culinary literacy, show personal improved outcomes and learn basic nutrition messaging that will be sustained over time.

## Leadership Lessons Learned

I am in the early stages of my ALP but it has been greatly supported by my staff and the hospital administration. It has multiple layers and many areas for expansion but my focus is to start with small steps so that I have complete buy-in from those who will be directly involved with implementation. One area of learning has been that creating the momentum for change can be quite challenging. It is important to have simple, clear and concise goals and objectives so that the team players will adopt the challenge with ownership. As Lencioni says from the book “The Five Dysfunctions of A Team,” “If you could get all the people in an organization rowing in the same direction, you could dominate any industry, in any market, against any competition, at any time.” As a leader, I will continue to identify my strengths and also work on the areas where improvement is needed.



### **Ilona Corpus**

Director of Dining Services

**O'Connor Woods**

Stockton, Calif.

### **In Her Own Words...**

Growing up in a communist country where money and jobs were scarce, I became independent at a very young age. Some of the decisions I made early in life were based solely on the need to survive. Because of that, I place a high value on hard work, fairness, consistency and supportiveness. While those are some of my positive qualities, I also can be a bit narrow-minded, set in my ways, and have a tendency to rely on my own thoughts and opinions. EMERGE has influenced me to look for ways to improve in my leadership style. I feel I am more open to considering other points of views and have learned to open my mind to look at the big picture. EMERGE has taught me different techniques to engage, mentor, and lead with an open heart and a focused mind, such as, applying the “tight-loose-tight” empowerment concept. Being part of EMERGE has also shown me that I have the passion, courage and potential to make a difference in this industry. I hope that my participation in EMERGE will also enhance my knowledge and my involvement in the aging services field.

## Standard of Excellence General Training Guide

My ALP is to create a Standard of Excellence General Training Guide for our Management Team. It will include four key elements: our organization's core values (dignity, caring, joy, community, peace of mind and, teamwork), policies and procedures, customer service skills and a quarterly leadership training guide with correlating tests. My ultimate goal with this project is to bridge the gap between employees and management. We, as leaders, sometimes feel like we are drowning under the weight of our own workload. We sometimes fail to recognize that our team is available to us and that we can rely on them more. We have a tendency to try to do things on our own because we have the attitude of "if you want it done right, you need to do it yourself." In reality, our staff could do an excellent job if we would just teach them, give them the right tools, and then provide the support to help them be successful. I am hoping that this training guide will give all of our managers the knowledge and skills to be exceptional leaders. Inspiring our line staff is critical to leading a successful team and I am encouraging our executive team to invest in this training and education. In doing so, we would be able to create a more productive and effective workforce.

## Long Term Organizational and/or Field Impact

I hope this project will lead my organization to greater success in the future. Our purpose is to honor, connect and to inspire seniors; and our vision is to transform how people perceive and experience aging. I believe if we have a strong workforce supported by a mission driven management team, we will be able to go above and beyond our existing mission, vision and values. In addition, after we are successful with this program, I would like to be able to share it with other non-profit organizations, so they can achieve the same outcome.

## Leadership Lessons Learned

I am still in the process of the implementation phase of my ALP and I am sure there is still much to learn. While researching my project I learned during the creation of my ALP that good leaders are also good followers. Prior to starting this project, I felt like I was not effective if I could not provide an immediate response to a question or problem. Having completed the EMERGE program, I now understand that we, as leaders, are not required to have all the answers. This process has taught me to listen, not only with my mind, but with my heart and to always reflect my values and what I believe in.



### Mary Grace Crisostomo

Asset Manager  
**American Baptist Homes  
of the West (ABHOW)**  
Pleasanton, Calif.

#### In Her Own Words...

My role as the Asset Manager for ABHOW's Affordable Housing Department and my 14-year tenure with ABHOW has provided me with the opportunities to be exposed to a management team that embodies excellent leadership skills. My role is geared towards mentoring and training as well as being a role model for all team members through my experiences in both the operations and the development sides of the Affordable Housing Department coupled with risk management.

The Emerge experience has been a journey that has often times left me speechless. My memorable experiences were the combination of delving more closely into Emotional Intelligence, applying the concept of the Six Thinking Hats and extracting key lessons from all the reading materials. The book, *The Five Dysfunctions of a Team*, had the most profound impression on me as it allows a team to become cohesive, establish parameters, open the arena for trust and, ultimately, work together towards achieving goals, despite challenges that may be encountered along the way. Reading about EQ was very enlightening but 'walking the reading material' was totally another agenda. I believe that embracing and applying the concept of EQ enables an individual to become an effective leader because it allows one to relate to team members at any level in an organization and make an impact. Furthermore, developing and honing one's EQ to the fullest opens the window to be a better individual.

The Leader's Legacy stressed on the importance of listening that goes hand in hand with trying to master the virtue of patience. Half the battle is won if we focus on honing these challenging skills.

These are a few examples of the wealth of materials provided to us that will help pave the path to achieve effective leadership skills and, in turn, allow us to leave a lasting legacy.

## **‘Deal Memo’**

My ALP is the Executive Summary for our Affordable Housing communities. The Summary will contain the essential information regarding a community. It will define in Summary format the structure of the entity in all areas of critical importance and will, ultimately, serve as a beneficial tool and resource for all stakeholders within and outside the organization. Additionally, the Summary will allow the accounting department with a recap of a project’s financial requirements and restrictions and thus, facilitate the accuracy in the bookkeeping process of a project, further reducing the chances of audit findings and/or out of compliance situations from the respective agreements. The Summary, likewise, will serve as a valuable tool for third party audit teams in completing audit engagements. The goal is to complete an Executive Summary for all of ABHOW’s Affordable Housing communities.

## **Long Term Organizational and/or Field Impact**

The completion of an Executive Summary for all ABHOW Affordable Housing communities will facilitate meeting all compliance requirements mandated by federal, state and local agencies as well as lenders and investors. The information contained in the Summary will allow the owners and all stakeholders to be cognizant of what is required to maintain the project’s operations in sync with required thresholds and goals while staying committed to the organization’s mission and vision statements.

## **Leadership Lessons Learned**

The first Executive Summary is scheduled to be completed by April 2014.

As I work on the first ‘Deal Memo’ for our organization, Emotional Intelligence and concepts from The Leader’s Legacy as well as the rest of the program materials will allow me to complete the project with the end goal of ensuring that all stakeholders will benefit from this valuable tool and resource.



### **Elena Davidenko**

Administrator of Health Services  
**Northern California Presbyterian  
Homes and Services - (NCPHS) –  
The Sequoias**  
Portola Valley, Calif.

#### **In Her Own Words...**

I believe it takes a certain person to be passionate about working in the field of aging services. The demand for these professionals has been increasing exponentially as the aging population continues to grow, so advanced training seems to be necessary for the future industry leaders. I have a sincere interest in our senior population and have met the most interesting people along the way. I think the objectives of the EMERGE program has enabled me to become a more effective, innovative and change-oriented leader. I plan to continue bringing my experience and expertise to benefiting my organization successfully and overcoming the challenges of a rapidly changing environment.

To be an effective leader, one must always be open to new experiences. The world is ever-changing and, to remain viable, we must change with it. It is our responsibility as leaders to develop our team members to achieve their greatest potential, which can lead to more effective and efficient operational processes.

Sequoias Portola Valley is in the process of expanding and upgrading its services. I aspire that my experience at EMERGE will help to successfully lead and manage long-term changes at the organization. I hope that through the course of the program I improve my communication and leadership skills to a degree in which I can make a sound contribution to the implementation of these changes.

## Transitions Between Levels of Care in CCRC Communities

Continuing Care Retirement Communities typically offer independent, assisted-living and skilled-nursing levels of care, serving everyone from active newcomers to older residents requiring round-the-clock care. Seniors move in to “age in” place and are expected to enjoy various amenities while healthy, and to receive excellent skilled-nursing care if they fall ill. Transition between levels of care has a direct correlation with decline of functional abilities to maintain independence, so it is often stressful and can be a major source of tension between residents and providers. Therefore, CCRCs should have clear clinical criteria for different levels of care; well-defined process of transfers and plans to educate residents to prepare them for such changes.

In my CCRC the model of continuing care provision is introduced, but the process has never been formalized to ensure the facility follows each of the required steps during inter-level transfers. Simplifying Transfer and Review procedure Check List, clarifying clinical criteria for each level of care and communicating the established process to the residents to make the process of transfer more transparent and less stressful are three objectives of my project.

## Long Term Organizational and/or Field Impact

It is my hope that Transition Between Levels of Care project impacts my organization in the area of delivering quality care and services to the community’s residents according to their needs; increased residents satisfaction through decreased feeling pressured due to better understanding the process of transfer; improved Resident Review process and better managed an appealed process for residents who are transferred involuntarily.

## Leadership Lessons Learned

I was able to utilize Emotional Intelligence, Crucibles of Leadership, Kottler’s 8 steps, Mind Mapping, Softball Questions, and Appreciative Inquiry.



### Marlena del Hierro

Regional Director of Community  
Outreach and Education

**AgeSong Senior Communities**  
San Francisco, Calif.

#### In Her Own Words...

I believe that my leadership style has been reflected by my passion and love for aspiring to be a role model in changing the face of aging. I am dedicated to improving the quality of care for older adults and know a vision can be accomplished with honesty and devotion. I hope my curiosity and existential-humanistic approach to expanding my knowledge will strengthen my leadership skills as I continue to grow professionally in the aging field.

EMERGE has sparked a determination for the continued growth in my leadership capabilities. Through my interactions with other professionals in the aging field, I experienced a connection to a variety of personality traits and strengths, which I felt with replication, could benefit my working environment. It is about understand your weaknesses and seeing leadership as a mindful process to becoming your better self for others.

Throughout EMERGE, I have been challenged to explore my strengths and how I can benefit my organization, but the greatest tool I have taken away from my role in this program is the power to inspire. I am inspired every day by the people I work with and the residents I meet. Being a leader involves the ability to influence a group of people into knowing they too are the change for tomorrow. EMERGE encourages a diverse group of people to lead one another into becoming well-rounded leaders for future impact.

## AgeSong Movement: Back to Living

AgeSong Senior Communities has dedicated themselves to a new management project that involves relicensing a 90-bed residential care facility for the elderly. Understanding the laws and regulations is just one entity for establishing a new community, but it is completing this state licensing application to incorporate the AgeSong program, model, vision, and mission. I will be assisting in the application processes for relicensing WoodPark Care LLC to AgeSong at WoodPark Care, as well as providing an AgeSong template manual for future licensing projects.

The AgeSong cultural model is formulated and described in a language, practice, and philosophy that must be characterized not only within the application process, but within our interactions with elders as we care for their needs. Detailed designed services in areas such as dining, resident wellness, hiring practices, enrichment, to emergency procedures are some of the many steps illustrated in a licensing application. The ultimate goal for relicensing WoodPark Care is to develop a living model for older adults to be cared for emotionally, mentally, and physically in a holistic and “freedom to be” environment.

## Long Term Organizational and/or Field Impact

The impact for my Action Learning Project is one that can be implemented in hopes of the continuation for newly established elder communities. Also, with the success for licensing an AgeSong community, we are able to provide and create a lifestyle for elders to live safely and freely as their emotional and spiritual needs are met. My ALP is about the bigger impact for residents once WoodPark is relicensed; it is re-establishing the meaning of eldercare as those embark on a journey Back to Living.

## Leadership Lessons Learned

The process that is involved for licensing AgeSong at WoodPark Care requires the collaboration and expertise from a variety of professionals to attain this goal. Working synergistically as a team required trust, patience, and accountability in knowing that we all are relying on one another. Because of the many job obligations outside of this project, it was sometimes easy to fall behind with deadlines, and it took an understanding approach for me to remind and support one another. Because my ALP was in a professional area I had very little experience around, I learned quickly that asking questions would only strength my knowledge to implement this project in a timely fashion. This project was an opportunity to creativity reflect on my EMERGE experiences to work with my team to accomplish a common goal.



### Liam Dunfey

Director of Admissions, Marketing,  
Public Relations, and the Senior Day  
Program

**St. Paul's Senior Homes  
& Services**  
San Diego, Calif.

### In His Own Words...

“The first responsibility of a leader is to define reality. The last is to say thank you. In between, the leader is a servant.” — Max DePree

The EMERGE program has strengthened my servant leadership values. I deeply respect the servant leadership model because it benefits teams through improved quality of work, increased productivity, reduction of cost and time, enhancement of service quality, and improved perception of the organization I am serving. These are the attributes that I use with my team and other staff every day in my service to prospective and current seniors at St. Paul's. Teamwork is a mandatory job requirement in the admissions department at St. Paul's. Covering walk-in and scheduled tours, hundreds of weekly inquiries over the phone and email, and organizing move-ins necessitate a variety of skills, but mostly they require quality and collegial coordination with peers and other staff.

## Capital Campaign for both Seniors and Programs

St. Paul's Retirement Homes Foundation has been raising money from foundations, corporations, and individuals for almost twenty years for the seniors and programs of St. Paul's. However, it may not be realizing its fund development potential through philanthropic gifts from individuals, the most important source of funding for non-profit organizations.

In 2014, St. Paul's will be hiring a fundraising firm that will evaluate our internal and external readiness for a capital campaign. It will be a comprehensive feasibility study that makes recommendations on how we can maximize our fund development potential, how much money we are ready to raise and what, if any, philosophical and/or Foundation operational changes need to be made.

My Action Learning Project will have three important parts in 2014 and beyond: 1) participate in the feasibility study meetings; 2) review the findings of the campaign feasibility study; and 3) depending upon the recommendations, work with the Foundation to move the campaign forward.

## Long Term Organizational and/or Field Impact

I hope my assistance with the campaign will advance the goals of the Foundation, St. Paul's, and ultimately raise needed funding for the next generation of seniors that will need our support.

## Leadership Lessons Learned

Leadership requires courage, patience, timing, strategic thinking, planning, and ultimately, execution. It wasn't an easy decision for me to pursue helping with the campaign since I don't work in the Foundation anymore. However, I entered the non-profit sector in 2000 with the goal of advancing organizations and their missions through the role of philanthropy and community relations.

The campaign will come into greater focus in 2014 and I'm fortunate to be a part of it.



### **Jana T. Gesinger**

Director of Social Services  
**Mercy Retirement & Care Center**  
Oakland, Calif.

#### **In Her Own Words...**

As a leader, I try to empower the staff by setting a foundation in which they would be able to build and experiment. When projects are complete, I stand aside and showcase the greatness of those who put their hearts in it. Emerge has given me a unique opportunity to explore my leadership style in ways that are not possible in 'real life.' Going deep into who I am and learning about myself helps me realize that we all are different and we learn differently. Emerge has helped me realize that I have a lot to offer to the field of aging on a global scale. It's very exciting to have new friends and allies to work with and use as a resource.

## Person Centered Care in SNF

My ALP is to revive person centered philosophy at my work place. We subscribe to Eden Alternative Philosophy and I wanted to embed the philosophy on a deeper level where residents would feel more at home. The vision of Eden Alternative philosophy is to eliminate loneliness, helplessness and boredom. Part of this philosophy is also changing the language from hospital-like to home-like. I started building on a Volunteer program we expanded about three years ago to create more opportunities for intergenerational programing and interaction. Our Volunteer program is an important part of person centeredness. Eden Alternative philosophy consists of ten principles. As part of my ALP, I have developed a ten-month plan of embedding Eden Alternative throughout the community, starting at the leadership level; in turn will roll into departments and then a community level for each principle during the given month. At the end of ten months, all principles will be known to the community, thus begin examining ways to improve our community.

## Long Term Organizational and/or Field Impact

This project will greatly improve the quality of life of our residents and staff and by living this philosophy we can help improve lives of others in the field as well.

## Leadership Lessons Learned

There are always lessons that are learned when a project is in progress. I am learning that nothing happens overnight and a slow and steady approach is better and more sustainable.



### Kenetta Jackson

Administrator  
**American Baptist Homes  
of the West (ABHOW)**  
Oakland, Calif.

#### In Her Own Words...

I have been working in Affordable Housing for over 15 years and I can truly say I enjoy it. I initially began in Multi-family and switched to senior housing and found it a good fit. I enjoy providing seniors with the best affordable housing experience one can get. This includes a beautiful unit, great services, wonderful activities and mission driven team members. I have always been passionate about being able to be a part of giving those who are less fortunate a home to be proud of. I have worked in some of the more challenging communities over the years and as a result I have learned how to communicate with various types of people. I use to be one who felt that a good leader was one who made sure that the job was done right and if that meant I had to do it all, I would. I didn't always feel comfortable asking for help when needed as that would be a cop-out. EMERGE has taught me many new techniques that can empower myself and others, to be open to listen to other ideas and that informing the team of a need and getting the "buy in" from the team is important and could make my job much easier. EMERGE has taught me to be considerate of the thoughts of others and that everyone has a voice and a great idea. This class really validated to me that I really have a passion for the aging service field and that it is important to me to be able to help others and to become a great leader in order to help with the success of the aging service field.

## Bridging the Gap

My ALP is to Bridge the Gap between the youth and the seniors in our housing communities with a local elementary school or daycare. The educators would bring the students to the facility to read and do various presentations for the seniors and the seniors would go to the school and participate in the different programs that they have that need more family participation. The interaction would provide the seniors in our communities with the company of youth for those who don't have grandchildren or family. The interaction would help the children to have an audience for various projects when the parents are not able to come, so no child would feel unnoticed or unloved. The seniors would encourage the youth and give positive feedback which is not always readily available. This program would be a relationship building program that will positively affect the lives of everyone involved.

## Long Term Organizational and/or Field Impact

My ALP is to Bridge the Gap between the youth and the seniors in our housing communities with a local elementary school or daycare. The educators would bring the students to the facility to read and do various presentations for the seniors and the seniors would go to the school and participate in the different programs that they have that need more family participation. The interaction would provide the seniors in our communities with the company of youth for those who don't have grandchildren or family. The interaction would help the children to have an audience for various projects when the parents are not able to come, so no child would feel unnoticed or unloved. The seniors would encourage the youth and give positive feedback which is not always readily available. This program would be a relationship building program that will positively affect the lives of everyone involved.

## Leadership Lessons Learned

I am still in the process of implementing my ALP and I realized that while brainstorming my project that it is first important to make sure that my project would benefit everyone involved. I realized being a great leader doesn't mean you have to have all the answers. I have been working with great leaders who enjoy what they do and enjoy making others great too. Preparing for my ALP has taught me to be a better listener, and to sincerely listen to the input of others who also have passionate contributions. EMERGE, has taught me that positions don't make leaders, leaders are made from individuals who are at every level. I will continue to strive at becoming a better leader and to make it my goal to be a great mentor to help others become leaders.



### **Kristine McKinney**

Human Resources Director  
**The Terraces of Los Gatos**  
Los Gatos, Calif.

#### **In Her Own Words...**

I am a leader that has integrity, a people person and is positive. Understanding the differences that make people unique and encouraging people are important to me. I am excited to motivate people to achieve their personal and professional goals.

Emerge has impacted me to not be afraid to make mistakes, to get out of my comfort zone, to be an innovative thinker, to ask why questions five times, to have fun and challenge myself.

Emerge has taught me that a Manager is not necessarily a Leader. I always thought of myself as a manager and that it was the same thing as a Leader. Emerge has made an impact on me in the discussion about the difference between a Manager and a Leader. I learned that Leaders determine the “what and why” and that managers work on the “how and when”. Essentially, Managers focus on tasks and leaders focus on relationships. Effective leaders have a high degree of emotional intelligence and it can be developed so I have been working on the areas of Self-awareness, Self Regulations, Motivation, Empathy and Social Skills. Leaders lay awake at night and consider the future.

The Six Thinking Hats by Edward De Bono has impacted how I view others in a group setting and how important each of the roles the hats play and why it is important to consider all of the ideas that are different than my own thinking. I typically wear the Black Hat in my role of HR but I can consider the other hats (white, yellow, green, red and blue).

Lastly, Mind Mapping has impacted on how I look at a new project or goal and how important all the other thoughts or ideas that needs to be considered for the outcome to be successful and have buy-in by others. If I see a problem that needs to be fixed or a goal that needs to be achieved, it becomes my focus.

## Career Development

At The Terraces of Los Gatos, Team Member (TM) satisfaction is one of our highest priorities. Therefore, I would like to create a Career Development Plan that allows development and growth.

For example, a Housekeeper could have the opportunity to move into a Housekeeping Lead, Housekeeping Manager, etc.

The purpose of career development is to enhance each TM current performance and enable TM to take advantage of future job opportunities.

- Complete a Self-Assessment (TM)
- Decide what they want from their careers now and in the future – Meet with Management to assess interests, strengths, and areas for development. (TM & Manager)
- Develop and support TM Development Plan with supervisor input, including current job development and short/long term career goals. Regularly, Management and TM will meet to discuss career and personal learning goals of the TM and the organization, identify the learning steps and resources needed, and put together a plan to achieve those goals over the coming year. It would include short & long term career goals, training opportunities, continued education, professional development & on the job learning that is needed to achieve them. (TM & Manager)
- Coaching (Manager)
- Identify the job-related knowledge, skills, abilities, competencies and experience that TM need to be effective in their position (Manager)

## Long Term Organizational and/or Field Impact

I expect that Career Development will impact our organization in the area of Recruitment and Retention, Job Satisfaction and Personal Growth and Development.

## Leadership Lessons Learned

I was able to utilize Mind Mapping, Emotional Intelligence, Softball Questions, and Appreciative Inquiry. I also learned that working together as a team to achieve my goal was extremely helpful and beneficial. Each person has their own individual thoughts and opinions that are important to consider.



### Allison Nord

Sodexo Area Manager

**Sodexo at The Terraces**

**Los Gatos**

Los Gatos, Calif.

### In Her Own Words...

My many years of well-rounded hospitality management experience has been a roller coaster ride of passionate, savvy, entrepreneurial, ambitious and creative solutions to difficult hospitality issues. My leadership journey and personal philosophy has always been built around two goals: creating that once in a lifetime or memorable special event, and life changing mentoring to employees. I excel at finding the right motivation in each person to develop their untapped potential and help them become effective Managers and Directors. It has allowed my teams to succeed in even the most challenging circumstances. My enthusiastic and high energy management style fosters creative thinking for maximizing ways to control costs while capturing underutilized revenue opportunities.

I deeply believe in creating the soulful and unique experience for both residents and employees. While I have successfully managed all other areas of high-end hospitality, seniors were a completely new challenge. Being involved in EMERGE has broadened my skills as a very effective strategic planner, and forced me to reevaluate my time management skills.

## The Chef Academy

One of the biggest challenges in Senior Communities is maintaining a quality, consistent, and healthy dining program. Food is one of the most anticipated activities of the day for many seniors, a personal connection to maintain a vital social experience and, more importantly, directly contributes to health and wellness.

Training and recruiting qualified culinary talent is always challenging. Many culinary employees have started from dishwashers and through the years worked their way up to cooks, kitchen managers and Sous chefs. Some have even achieved Executive Chef status. While longevity is very valued, their experience is also limited to only one type of venue. An energized and well trained staff is vital to provide a creative, cost effective, exciting dining program. Residents see value in a “Certified” certificate for many of the employees beginning their leadership journey.

## Long Term Organizational and/or Field Impact

Culinary school is expensive and students are graduating from pop up schools everywhere, promising bright futures and big celebrity-type paychecks, without many of the practical skills truly needed to be successful. The senior market is in need of a culinary training academy at an actual working account. Focusing on basic and advanced cooking skills, presentation, menu design, catering and special events, purchasing and cost analysis, budgeting, marketing and merchandising, and leadership training, the Chefs Academy program will not only maximize the ability and performance of our culinary employees but also elevate the residents’ connection and experience going forward.

With the support and wealth of knowledge that embodies Sodexo this program can be on the cutting edge of future trends, resident satisfaction and lead the way to how we approach and deliver senior dining programs.

## Leadership Lessons Learned

Culinary school is expensive and students are graduating from pop up schools everywhere, promising bright futures and big celebrity-type paychecks, without many of the practical skills truly needed to be successful.

The senior market is in need of a culinary training academy at an actual working account. Focusing on basic and advanced cooking skills, presentation, menu design, catering and special events, purchasing and cost analysis, budgeting, marketing and merchandising, and leadership training, the Chefs Academy program will not only maximize the ability and performance of our culinary employees but also elevate the residents’ connection and experience going forward.

With the support and wealth of knowledge that embodies Sodexo this program can be on the cutting edge of future trends, resident satisfaction and lead the way to how we approach and deliver senior dining programs.



### Mark Rivera

Medical Records Manager  
**The Terraces of Los Gatos**  
Los Gatos, Calif.

#### In His Own Words...

I learned at an early age how devastating it can be for a person living in a health care setting. My father spent 3 months in a hospital before he passed away. This has probably made a great impact on me in terms of how I function as a leader. Miscommunication was often an issue leading to the added stress to the patients and their family members in the hospitals that I was familiar with. This is why I have focused so much on easing the transfer of communication to the most effective and organized way possible.

With my own experience in the aging services, I have learned there is nothing more rewarding than seeing the result of your hard work that is reflected in the satisfaction and faces of residents. My leadership style had always been educating the team to ensure that each process and service is executed up to the standards of the residents we are serving.

With the help of EMERGE, I have learned to take into account the experiences and each person's perspectives instead of making assumptions on individuals. I learned to actively listen to others to understand their perspectives and backgrounds. This has strengthened my dedication on focusing on the individual growth of each team members as well as the residents. Open communication, a friendly banter and the use of constructive criticism amongst team members is necessary to create a sense of professionalism and respect in the work place.

Often times we focus so much on the struggles of achieving the results that we often forget the goal at hand as well as the overall process. No matter how tough the struggles and experience presented are, those moments have the potential to be our own defining moment. In turn, the true definition of leadership for me is my own pursuit of constantly learning the necessary skills for my field and passing that knowledge on to those who serve the elderly- after all, being an elder is not defined by one's age but by the knowledge and experience each person has within, and we often tend to forget this simple yet important fact.

## Team Member Engagement and Performance Improvement Committee

I believe most of the conflict comes from the misunderstanding of each department's lack of familiarization of each other's task and roles. This is where exposing each participant in an "open house" concept is crucial for the organization's success in general. An open house concept is the idea that each team member gets to spend a day in a life of a department manager, exposing each one to the daily task and process according their job description. If a conflict arises in the future, a team member can have a better understanding of each person involved in the care of a resident.

Managing quality of care can be addressed by quality checking each department's process. Analyzing each other's work and involvement in the process can better improve the quality of the task.

After an issue is identified, the team-member committee, with their new training, can analyze and place or recommend process improvements. Throughout our class the panel interviews mentions focusing on direct line workers because of they are the experts in each resident's care and daily routine. There is no better way of approaching each issue than by taking into account their experiences and daily tasks on the floor.

## Long Term Organizational and/or Field Impact

I thought of this ALP in hopes of improving direct line worker and management team relationship that will ultimately improve the quality of services and ease the transfer of information we provide to our residents. With my experience and interviews with the aging community experts, I have noticed a big disconnect between management and their subordinates.

Understanding the business needs and why the process need correcting removes animosity towards the management due to a more comprehensive understanding of each person's role in a community.

## Leadership Lessons Learned

The biggest hurdle is creating a buy in for all members involved- while some individuals were very welcoming, most of them were hesitant. The breakthrough came in our third session when all the finger pointing, anger and arguments turned to a productive process improvement where most of the creative ideas started to flow from each member of the committee. The "six thinking hat" was applied to this concept along with the three book assignments. I adopted and took away with me the importance of clear communications and the importance of understanding your team's anger and frustrations. This can be a transformational experience and an invaluable opportunity for change.



### Carolee Rodrigo

Assistant Director of Active Living  
**Masonic Homes of California**  
Union City, Calif.

#### In Her Own Words...

Working in the field of health care has been something I always knew I wanted to do. Assisting people of all ages in attaining a whole wellness of being is my passion. When I began working with elders about 10 years ago I realized this is the place for me. My calling is to help change the way that we deliver service in the communities we work in. At this time, how we are engaging our elders in their lives, in their homes, their communities and ultimately at the state level are of great importance.

## Live Well Initiative

Currently I am leading the Live Well initiative at the Masonic Homes of CA. The Live Well Initiative looks at 3 different aspects of service delivery:

1. Successful Aging of Resident living at MHC
2. Employee Wellness
3. Greater purpose – how do we give back to our community

The Live Well initiative is forcing the organization to look at transforming the current culture from one of a paternalistic approach to one of independence, vitality and engagement for residents and employees. We look at all the components of wellness to see if staff and residents are engaged and balanced in each component. If not then how do we create a community that fosters growth?

## Long Term Organizational and/or Field Impact

Research indicates that successful aging is 30% genetic and 70% lifestyle choices. When looking at how residents and employees at MHC are aging, it is important to create the most supportive environment for successful aging. Focusing on what is possible and creating an environment that encourages growth, opportunities and independence.

## Leadership Lessons Learned

As a leader I have learned to motivate those I work with through my actions, to support them in renewing what they do on a daily basis to enhance the lives of the residents that they serve. Look at everything as a possibility. To listen for meaning, this has helped me get a better understanding of myself. The greatest lesson I have learned is that change can come at a slow rate. But with tenacity, determination, hard work and a passion to bring your vision to fruition – change will happen!



### Andrea Smith

Administrative Assistant/Social  
Services Designee

**Pilgrim Place**  
Claremont, Calif.

### In Her Own Words...

During my almost six years at Pilgrim Place Health Services Center, I feel that I have been given the opportunity to grow and excel in my positions. Although I do not directly supervise staff, over the past two years, I was given the opportunity to serve as Neighborhood Coordinator for the Memory Care Neighborhood at the Health Center. The role of Neighborhood Coordinator has allowed me to model my commitment to our residents' well-being and satisfaction by setting the tone for the Neighborhood by supporting resident centered care. As Social Services Designee, I also work closely with our interdisciplinary team to set interventions that support resident centered care. Advocating for our residents and being their voice, especially for those with a diagnosis of Dementia/Alzheimer's, has become my passion. Leading by example is something that I whole heartedly believe in and strive to demonstrate on a daily basis. As leaders, we should be expected to "practice what we preach". It is not enough to say something and expect others to do it if we do not demonstrate it ourselves. I believe this has helped me gain trust and respect from our residents, their families and my co-workers.

The EMERGE program and experience is something that will stay with me for my lifetime. Through the program, I have been able to find my own leadership voice. It has made me realize, my voice needs to be heard in order to advocate for my residents. The most important lesson that I have learned is to stop and listen; although, this has not been a lesson that I have easily learned. It is often easy to interrupt someone and give your own viewpoint rather than allowing someone to finish what they have to say. One of the activities that I found most significant during one of the EMERGE sessions was when we were asked to partner with someone, each person was given a couple of minutes to speak while the other one listened, and then we switched. This activity sticks with me each time I engage in a conversation. I remind myself to give the other person their time before I speak. This has not only helped me in my positions as Administrative Assistant and Social Services Designee at Pilgrim Place Health Services Center, but also in my personal life.

## Providing Care in a CCRC

My contribution to the palliative care team at Pilgrim Place is to create a social service assessment that addresses the psychosocial, spiritual and cultural aspects of care with considerations of a person's mood and interest, adjustment to illness and cultural diversity. Cultural issues around the end of life will also be addressed and a caregiver assessment will be created to address caregiver burden and stress. Referrals to support groups, community resources and education will be made available to caregivers. Along with the assessments, we will also utilize the Conversation Project to assist families with beginning the conversations regarding their end-of-life wishes. One of the challenges that I foresee is the taboo surrounding end-of-life conversations with some cultures. Staff education regarding end-of-life and cultural differences will continue to be an ongoing process.

## Long Term Organizational and/or Field Impact

My contribution to the palliative care team at Pilgrim Place is to create a social service assessment that addresses the psychosocial, spiritual and cultural aspects of care with considerations of a person's mood and interest, adjustment to illness and cultural diversity. Cultural issues around the end of life will also be addressed and a caregiver assessment will be created to address caregiver burden and stress. Referrals to support groups, community resources and education will be made available to caregivers. Along with the assessments, we will also utilize the Conversation Project to assist families with beginning the conversations regarding their end-of-life wishes. One of the challenges that I foresee is the taboo surrounding end-of-life conversations with some cultures. Staff education regarding end-of-life and cultural differences will continue to be an ongoing process.

## Leadership Lessons Learned

One of the lessons I learned while implementing my Action Learning Project came from the book presentation of Five Dysfunctions of a Team. There was clarity from our leader, my Administrator, and there was buy-in from the team. We were all given a clear plan of action with an ultimate goal that needed to be accomplished. The leadership that she emulates as my mentor is what I strive to be one day. As Lencioni states in the book Five Dysfunctions of a Team: "If you get all the people in an organization rowing in the same direction, you could dominate any industry, in any market, against any competition, at any time."



### Alexandra Steadman

Executive Administrative Assistant  
**Valle Verde Retirement**  
Santa Barbara, Calif.

#### In Her Own Words...

In my position as an Executive Assistant my role as a leader is not clearly defined. While I have felt part of the leadership of our community, I didn't consider myself a leader until a former boss commented that I "lead from the middle". I thought about this concept a lot as I've gone through the EMERGE program and how it relates to my leadership style. Leading from the middle requires me to work with upper management, staff and residents. It requires me to be flexible, resilient and communicative in order to gain positive momentum to reach a desired outcome. Because of these factors I have developed a personal leadership style that is collaborative.

EMERGE has impacted my leadership style by helping me define it and find ways to cultivate it. My experience has been energizing and thought provoking and has taught me to develop leadership skills outside of my norm. I have learned when it's beneficial to "wear the black hat" and ask the tough questions, the importance of team cohesion and the process that can get you there, how appreciative inquiry (softball questions) can identify the root of an issue so that a resolution can be achieved, and perhaps my favorite, the concept of "tight loose tight" and how it can inspire others to be creative in their jobs with the necessary boundaries to keep them on track. My working relationships with those I supervise have been strengthened by what I've learned.

What I will take away from EMERGE is that leadership can be learned, that it is about inspiration and that it is a lifelong process. I am committed to seek out inspiration and experiences that motivate me to achieve personal success and to facilitate success in others.

## The Valle Verde New Resident Welcome Orientation

My action learning project is the development of the Valle Verde New Resident Welcome and Orientation. The purpose of the program is to provide a much needed bridge between the sales process and the move in process as our new residents become a unique part of our distinctive community. The orientation is designed to provide a warm and informational welcome to new residents. It will encompass a one on one personal welcome over coffee or lunch, an informative reference guide to keep and a group presentation with other new residents. During the group presentation each department director will be introduced and share information about the services their departments offer.

It is my expectation that the program will grow and develop to meet the needs of the residents as they adjust to their new lifestyle. It is also the purpose of the program to get to know the new residents and their individual interests so we can assist them in becoming engaged in the community.

## Long Term Organizational and/or Field Impact

My hope for the New Resident Welcome and Orientation is that it will benefit Valle Verde by giving new residents a first impression of friendliness and inclusiveness. I believe that if our new residents become engaged and participate in campus life quickly and easily they are more likely enjoy a desirable lifestyle. Our residents are our most valuable marketing tool and we want them to encourage their friends to come to our community, making Valle Verde Santa Barbara's most sought after retirement community.

## Leadership Lessons Learned

I began developing the New Resident Welcome and Orientation six months ago. We have presented the program four times. The concept and program are working well but it still needs some work to better meet the desired outcome. I've been good at seeing what needs to be done and engaging the right resources and people to achieve results. What I've learned is to accept that the best program develops over time with feedback from others. Trial and error are not bad things; they are just tools that bring me closer to a program reaches the new residents in a way that makes their life at Valle Verde the best it can be.



### **Gisele G. Tackoor**

Director of Recruitment  
and Admissions

**Pilgrim Place**  
Claremont, Calif.

#### **In Her Own Words...**

One of the ways that EMERGE has made an impact on my leadership style is that it stretched me beyond purely being a leader and trained me how to think like a leader. In my EMERGE application I stated I have always fallen into leadership positions whether intentionally or unintentionally throughout my personal and professional life. I described the key attributes I possess that make me an effective leader such as having integrity, being dependable and empowering others. It wasn't however until my EMERGE experience that I was placed in a position to intentionally reflect upon who I am as a leader.

EMERGE made me question my own leadership style. It made me wonder if those who report to me and work alongside me would describe my leadership methods the same way I would describe them about myself.

EMERGE offered me assessment tools to evaluate myself as a leader and also to assess the various leadership traits in my colleagues. One of my favorite self-assessment exercises, that happened to be quite challenging, was to wear a "different thinking hat" than the one I would typically wear when attempting to solve a problem. This technique was much more than considering the two sides of any given situation, as my legal education taught me. It was a lesson in utilizing several different points of view when it came to creative decision making. This technique forced me to assume the individual character traits of others as my own and to analyze a situation using six various perspectives. It reinforced the value of group discussion and the importance of each individual's opinion within the group. I have done many exercises in problem solving but this exercise was new to me and one I will incorporate into my own leadership style.

## Cultivating Ethnic and Cultural Diversity at Pilgrim Place

My ALP is on increasing racial and ethnic diversity of residents at Pilgrim Place. I chose this project because the lack of racial and ethnic diversity is a concern amongst residents. It has been expressed by many that the scarcity of diversity in this community deprives them of the rich human fusion that is characteristic of our national life.

As the Director of Recruitment and Admissions at Pilgrim Place, I am involved with a working group consisting of residents, administration and board members to oversee the exploration of the steps toward diversity. The decision to recruit residents from diverse backgrounds is not a new issue at Pilgrim Place. What is new is the attempt at an innovative solution for better outcomes.

## Long Term Organizational and/or Field Impact

The long-term impact of increasing the racial and ethnic diversity at Pilgrim Place will be substantial. Pilgrim Place was established in 1915 as a residence for missionaries on furlough. It has evolved to include persons who served in religious or non-profit charitable organizations. Many residents are from mainline Christian churches. The core values of social justice and the history of Pilgrim Place are what make the community unique. Increasing the number of minorities at Pilgrim Place is welcome, but for some residents it brings about a change in the ethos and culture. The familiar Christian traditions will be affected. The hope of my ALP is that Pilgrim Place undergoes the types of intentional change that continues to enrich and enliven the community and yet, allows it to maintain its' values of genuinely caring for one another, the community and the world. It is also my hope that what we learn at Pilgrim Place can be used to help other senior communities pursuing the goal of greater diversity.

## Leadership Lessons Learned

One of the leadership lessons I have learned thus far as a result of my participation in my ALP is the art of listening. For me, this ALP has been one of personal sensitivity. It is fascinating to me to hear from the community as to how they feel about increasing racial and ethnic diversity at Pilgrim Place and the barriers we, as a community, may face in attempting to do so. If the ALP is successful, one of my main duties as the Admissions Director will be to implement the recruitment process. Since I am not a resident at Pilgrim Place, active listening is a critical component. It will allow me to fully understand the desire and vision of the community and promote it in an informative and effective manner to those considering a move to Pilgrim Place.



### Rithy Thong

Executive Director

**L.A. Huntington Health Care**

Long Beach, Calif.

### In His Own Words...

Leadership is about finding comfort in the here and now, and the ability to make manifest your holistic self. Leadership is being able to find purpose in the mundane, and the ability to engage other people along this journey of self-exploration and self-actualization. Leadership is a reciprocal process. It is the result of a balanced, mutually influenced, ongoing exchange between two or more invested individuals. Leadership is in all of us if it is potentiated.

EMERGE was the microscope that enabled me to examine myself from the inside out. With each session, my leadership DNA developed revealing and expanding my subjective self – and hence my leadership voice. As my leadership voice continues to sound it is my wish to inspire other people to do the same.

## Seniors and Scholars: Connecting to the Past to Create a Future™

Seniors and Scholars is a registry service. Its purpose is to provide intergenerational support and companionship for both seniors and graduate students (or scholars). The program is twofold: 1) Support the need and desire of seniors to maintain residence in their own homes and communities; and 2) Decrease the financial strain of graduate students in the “helping profession” through shared housing. For the seniors: Live-in scholar becomes an extra set of eyes and ears who provides support, companionship, and meaningful shared experiences; Live-in scholar can assist with light (non-medical) duties, transportation, cooking, and other duties as agreed upon. For the scholars: Senior provides room and board at a reduced fee or no fee; Senior provides scholar invaluable, firsthand knowledge and experience working with the population of their professional interest.

### Long Term Organizational and/or Field Impact

I am currently working with the Leonard Davis School of Gerontology at USC to identify potential candidates (both seniors and scholars) to conduct a focus group. After the completion of this study, I will evaluate the general feasibility of “piloting” the ALP at USC. The questions that I hope to answer are: Is the ALP a sustainable, financially feasible business plan? Can the ALP be replicated at other universities?

### Leadership Lessons Learned

A great idea is not necessary great if the need is not there. A good idea becomes a great idea when the need has been identified, a plan is clearly articulated and carried out, and flexibility of process is achieved to attain or to revise the goal. Thus, it is best to have tried – to give thought to an idea – then not to have tried at all. It is also better to surrender an idea when the idea cannot be clearly defined, when the plan is not clearly articulated, or when present circumstances prevent a natural progression of the idea.

My ALP was a journey that included mistakes; caused re-examination of project goals and processes, and that encompassed teamwork, collaboration, and engagement. It required active listening skills, group facilitation skills, and the practice and implementation of learned leadership skills.



### Jennifer Torres

Regional Property Supervisor  
**American Baptist Homes  
of the West, So Cal**  
Pleasanton, Calif.

#### In Her Own Words...

I was raised by a single mother in an environment where the need for affordable housing deeply outsized its availability. For that reason, there is a lot of passion behind the work that I do. The impact that we make in the lives of our residents is clear and present to me, which brings me to lead with my heart on my sleeve. I am fast-paced, high energy and always ready to tackle new challenges. I value hard work, integrity and am never scared to roll up my sleeves and get dirty. Having worn many 'hats' in our industry, I am often able to assist my team pulling from hand on experience or examples of my past. These are all good things, right? No. Some of that same 'passion' and 'high energy' is what causes my short-comings as a leader, short comings that through EMERGE, I am able to recognize and address. I understand now that everyone has a process when problem solving, and that a good leader allows all the team members to have a voice. Through EMERGE, I have learned to slow down, to 'resist my need to fill the silence' when brain-storming with my team, and the importance of letting my team know that I hear them. My experience in EMERGE has been a powerful one, and without a doubt a defining moment of my professional career. Thank you EMERGE.

## Senior Administrator: Meeting Today's Needs, Developing Skills for Tomorrow

My ALP comes from the need to promote employee development and incorporate peer support. ABHOW is based out of Pleasanton, CA but is spread throughout California and Washington. Training, implementation of policies and maintaining our ABHOW Advantage culture can be challenging. We embrace upholding an environment where team members are able to take part in the planning of the work that affects them. This includes giving our team members opportunities the tools to seize opportunities for growth.

Creating a Senior Administrator (SA) position for each region addresses these areas by offering direct support to a regional team, while shadowing the Regional Property Supervisor (RPS) in preparation for career progression. The SA would be tasked with organizing the on-boarding of new employees, support in training, software and HUD compliance. This position would be held by an ambitious team player; able to manage their time wisely to fulfill the needs of their base community while supporting others. Administrators would have timely support and position itself offers a transitional forum for those looking towards next steps in their career. Furthermore, ABHOW has the opportunity to promote from within with confidence and stay true to our motto "We are extraordinary professionals, serving extraordinary people."

## Long Term Organizational and/or Field Impact

Overall, I hope that my ALP assists us to better serve our team members so that in turn they better serve our residents. Having started my career in affordable housing on-site, I know the frustration that comes from sitting at your community and not getting the answers you need as quickly as you need them from the corporate office. Now being in the corporate office, I understand the frustration that comes with not having enough hours in the day to answer all the questions that arise from all the different communities. The Senior Administrator position would offer an additional layer of support for both ends of that conundrum. Additionally, my personal career has depended on organizations that spent time and resources in employee development, and for that reason, this is something I truly value. Team members are an organization's most valuable assets, thus investing in our team members and developing own talent is the best method of capitalization. I believe my ALP will be a pivotal step in addressing these two issues.

## Leadership Lessons Learned

The biggest lesson learned during my ALP process is patience. Organizations, business models and the procedures behind them take time to build, likewise so do any changes made to them. I learned not to become defensive at any resistance to my plan, but rather to be more prepared. Do more research, ask more questions, have more answers, listen and wait. Sometimes, giving others times to see your vision is all it takes.



### Ron Wall

Partner  
**Axiom Healthcare Group**  
Ontario, Calif.

#### In His Own Words...

My guiding principle as a leader has been to treat others as I would like to be treated. I have tended to focus on positive aspects of those I have charge of. I tend to instill in others that my role as their manager is to provide the support they need to perform their job. In new positions I will assess the skills of others first then provide direction that is focused on guiding the team in the course I feel is warranted.

I use an approach a former mentor taught me called “Focus”. In most situations there are multiple issues to be dealt with. The Focus approach chooses one at a time to work on. After one is resolved you move onto the next. A standard of performance is set as a goal for the team and individuals. Once that standard is reached, the next issue can be worked upon.

The EMERGE program has influenced me in two major ways. First it has reinforced some of my own beliefs and reminded me of some I have forgotten or lapsed in practice. The second is the exposure to different systems and approaches to leadership. The first includes quantification of guiding principles. Both the reading we performed and the instruction Kay and Michele provided gave a name to these principles that provides a handle to share and implement. As mentioned in class, I now have more arrows in my quiver to address issues. The chances of success are enhanced because of diverse approaches.

Lastly EMERGE reminded me of the value of stories from reading and what participants shared. We will remember the stories more than facts. Stories are powerful vehicles for educating and imparting team culture.

## Engaging in LeadingAge

Our company is a leader amongst for-profit long term care professionals. We have not been as involved in the not-for-profit sector of our profession. My Action Learning Plan (ALP) is to see that Axiom Healthcare Group has as much involvement in Leading Age as we do in CAHF (California Association of Health Facilities)

First I have discussed this idea with the other four partners of Axiom. They are supportive of the project.

Second is to discover what opportunities there are to formally participate in Leading Age? These include events to attend, participate in trade shows, attending regional chapter meetings, attend statewide conferences, attend educational conferences, provide sponsorship support for Leading Age, and perform educational programs at conferences and regional chapters.

I will work with our leadership to develop a plan to define specific goals and an action plan of what is to be done by whom and in what time frame. This plan will give us a roadmap and keep us accountable.

## Long Term Organizational and/or Field Impact

Through my ALP our organization will be contributing to the whole of our profession. We will serve a broader spectrum of providers and have greater presence in the profession. We have abilities that have positively influenced our profession in the for profit arena. We can provide those same services to Leading Age members to the same result.

## Leadership Lessons Learned

Leading Age is a much more diverse organization than those I have been involved in in the past. Exposure to other sectors of our profession has helped me realize that there is more to aging services than skilled nursing. Through this experience I have learned to see our profession as a continuum rather than separate distinct sectors.

This has impacted by thought process in how decisions are made when educating clients in my consulting practice or instructing co-workers within my firm. Awareness that other areas within our profession have the same level of concern, quality standards, expertise and devotion to seniors has changed the manner in which I will recommend placement of client/residents and advice I offer to my consulting clients.

Most importantly I have learned that involvement in our professional organizations such as Leading Age is part of being a good citizen within our professional community. Only through uniting in this type of forum can we seek the outcomes we desire for our profession, business and aging constituency. We can speak louder to our political leadership. We can support one another. We can learn from each other. We can educate the general population that we are a profession who serves the aging in a quality manner.



### Connie Yuen

Program Coordinator

**St. Paul's Towers (Episcopal Senior Communities)**

Ontario, Calif.

### In Her Own Words...

Being the first in my entire family to be born in the United States, I have witnessed the many struggles while trying to achieve the “American Dream”. As a family we faced adversities and had to overcome hurdles, but looking back these were all blessings in disguise because it has shaped me into the leader I am today. These life experiences have taught me life lessons and have instilled a strong sense of responsibility and integrity. They have also developed my courage to take a stand and provide a voice for those who are underrepresented. As I watch my loved ones grow older and require higher levels of care, it has been my personal mission to find them the best care and services possible. I expect nothing less than exceptional care for my family members, so I hold myself to the high standards of only providing exceptional care to others.

When I first began EMERGE, I had a difficult time identifying my leadership style. As we progressed in EMERGE, I came to realize that not everyone adheres to one leadership style. In fact, the influential leaders we have encountered through this journey together have shared their practice of valuing different leadership styles depending on the circumstance and environment. I have a hard time with failure and struggle to move forward when I fail to meet a goal. EMERGE has reminded me that crucible moments, such as failing, help carve out who we are as individuals and as leaders. You may not have achieved your goal, but you have gained an important lesson and a valuable experience. Crucible moments add depth to our character, and contribute to our personal and professional purpose.

## Intergenerational Enrichment Program

Today's seniors and youth are limited in meaningful relationships with one another due to either distance or lack of opportunity. In an effort to eliminate the separation and stereotypes associated with seniors and youth, my goal is to create a program in which lives are enhanced as a direct result of each other's company. This can be achieved by learning skill sets from one another and creating memories. By partnering with St. Paul's Episcopal School and the Girl Scouts, a series of educational and recreational activities will be implemented in an ongoing basis to assist in building significant relationships. The program will be rolled out in several phases in order for the youth and seniors to become familiar and comfortable with one another. Once the trust and comfort level has been established, we will engage in art projects, modified sports games, storytelling, homework assistance, career fairs, public speaking, etiquette training and technology training. What I hope to achieve through this Intergenerational Enrichment Program is to establish a greater appreciation and respect between the two generations. Both groups have much wisdom to share if given the opportunity.

## Long Term Organizational and/or Field Impact

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## Leadership Lessons Learned

Through the planning and implementation stages of this project, my leadership style has greatly developed. EMERGE has taught me that your goal will always be within reach but the process in getting there may change or take different turns, but always keep your eyes on that prize. The concept of "tight, loose, tight" has been a huge turning point in my experience; being firm and setting real expectations when needed but also allow things to happen freely and organically. It is through this concept that has allowed me to be more innovative through different leadership styles and create opportunities for others to get involved and help build this program to its maximum potential.

### Sponsoring Organizations

LeadingAge California appreciates the following member organizations that sponsored Fellows to participate in the EMERGE Class of 2013-2014:

**AgeSong Institute**  
San Francisco, Calif.

**O'Connor Woods**  
Stockton, Calif.

**American Baptist Homes of the West**  
Pleasanton, Calif.

**Pilgrim Place**  
Claremont, Calif.

**Axiom Healthcare Group**  
Ontario, Calif.

**St. Paul's Senior Homes and Services**  
San Diego, Calif.

**Laguna Honda Hospital and Rehab Center**  
San Francisco, Calif.

**St. Paul's Towers**  
Oakland, Calif.

**L.A. Huntington Care**  
Long Beach, Calif.

**The Sequoias**  
Portola Valley, Calif.

**Masonic Homes of California-Union City**  
Union City, Calif.

**The Terraces of Los Gatos**  
Los Gatos, Calif.

**Mercy Retirement and Care Center**  
Oakland, Calif.

**Valle Verde Retirement Community**  
Santa Barbara, Calif.

**Mt. San Antonio Gardens**  
Pomona, Calif.

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### Site Visit Hosts

LeadingAge California extends its gratitude to the following member communities for hosting the Class of 2013-2014 site visits and panel discussions.

**Wesley Palms**  
San Diego, Calif.

**Casa Dorinda**  
Montecito, Calif.

**Eskaton Adult Health Center**  
Carmichael, Calif.

## Coaches

LeadingAge California is extremely thankful for our outstanding coaches who are experienced leaders in our field and served as mentors to the Fellows throughout the program:



### Greg Garrett

Chief Executive  
Officer  
InnovAge  
San Mateo, Calif.

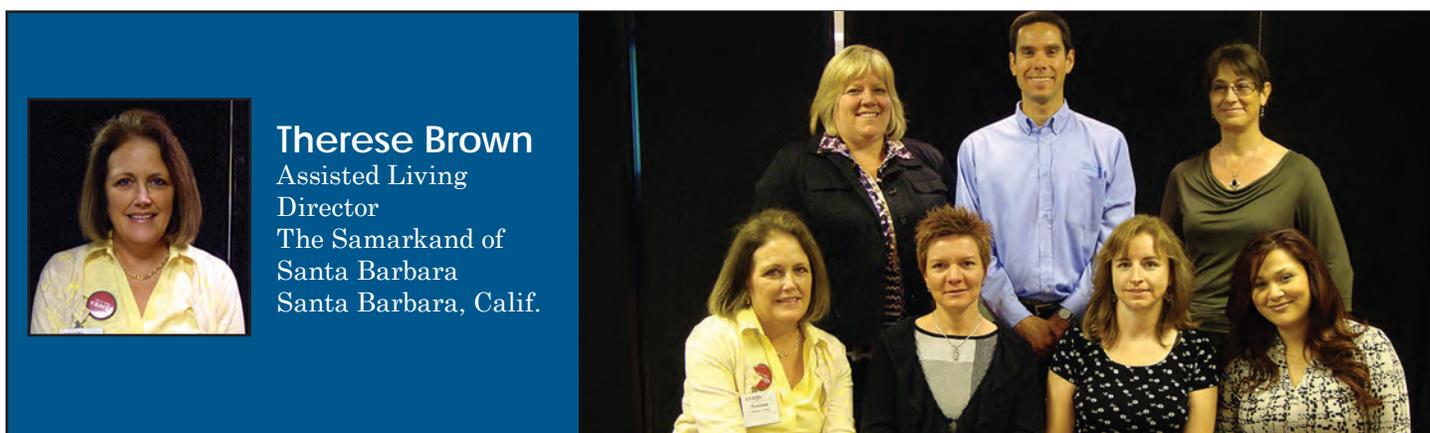
**From top left:** Andrea Smith, Grace Crisotomo, Kristi McKinney, Loretta Cecconi  
**From bottom left:** Greg Garrett, Alexa Steadman, Elena Davidenko, Ron Wall



### Justin Weber

Administrator  
St. Paul's Villa  
San Diego, Calif.

**From top left:** Kenetta Jackson, Rithy Thong, Connie Yuen, Ilona Corpus, Veronica Arevalo, Justin Weber, Marlina del Hierro  
**From bottom left:** Mark Rivera



### Therese Brown

Assisted Living  
Director  
The Samarkand of  
Santa Barbara  
Santa Barbara, Calif.

**From top left:** Allison Nord, Liam Dunfey, Deborah Barrette  
**From bottom left:** Therese Brown, Jana Gesinger, Carolee Rodrigo, Jennifer Torres

### Facilitators

LeadingAge California is grateful for the wisdom and guidance provided to the EMERGE Class of 2013-2014 by its dedicated and committed facilitators:



#### **Kay Kallander** – Facilitator

Senior Vice President, Strategic Planning  
American Baptist Homes of the West  
Pleasanton, Calif.



#### **Michele Holleran** – Facilitator

Founder  
DeArment Consulting & Holleran  
Crested Butte, Colorado



#### **Kevin Tuuaga** – EMERGE Program Staff

Member Engagement Manager  
LeadingAge California  
Sacramento, Calif.

LeadingAge California would also like to express its appreciation for the following members – without whose involvement, EMERGE would not have been possible:

**Sheri Peifer, Eskaton • Michelle Cuevas, TELACU • Lea Pipes, Motion Picture and Television Fund • Jennifer Sternshein, Collins & Rehaste, LLP • Alex Candalla, Terraces of Los Gatos**

## EMERGE 2013-2014 Sponsor

A special thanks to our EMERGE 2013-2014 Sponsor, for their shared vision in cultivating high-potential leaders who will inspire, innovate and educate other members in the field of aging services.





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