

2018-2019



LEADERSHIP  
DEVELOPMENT  
PROGRAM

# ACTION LEARNING PROJECTS

**EMERGE** is a comprehensive leadership development program specifically designed to better prepare future leaders within the LeadingAge California membership. Last year LeadingAge California, in partnership with Masonic Homes and Value First, began guiding its 8th cohort of emerging leaders in the field of aging services through the program. The Class of 2018-2019 was comprised of high potential individuals across the state of California serving in different facets of long-term care who were seeking to transform themselves and their organizations.

The program is available to anyone working for a LeadingAge California member, whether a voting member or a business partner, irrespective of position or work experience. It is far more important for Fellows to demonstrate potential within their organizations than it is for them to carry specific job titles. The Fellows chosen to participate met four times within the past 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 execution of their ALP. In the following pages, you will have the opportunity to view some of the hard work and dedication each Fellow put in to implement their project.

The Class of 2018-2019 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?



## TABLE OF CONTENTS

THE FELLOWS' INSIGHTS AND OBSERVATIONS ARE PRESENTED IN THE FOLLOWING PAGES...

Claudia Butler .....	4	Aireen Tibon .....	34
Lisa Coe .....	6	Rosa Torres .....	36
Julia Early.....	8	Shirley Turner .....	38
Michael Easbey .....	10	Bernadette Viray .....	40
Megan Foster.....	12	Mary Vo .....	42
Jane King.....	14	Elisa Walker.....	44
Sarah Leck .....	16	Kristen Wanner.....	46
Cammille Lo-Li .....	18	Sponsors and Hosts .....	48
Gina Manansala .....	20	EMERGE Coaches.....	49
Cristina Mendez .....	22	Facilitators & Staff .....	50
Jessica Montes .....	24	EMERGE Program Sponsor.....	51
Yvette Ochoa .....	26		
Antonio Roque.....	28		
Paige Ryan .....	30		
Jordan Shanahan.....	32		



### **Claudia Butler**

Regional Property Supervisor

**HumanGood**

Pleasanton, CA

### **In One's Own Words...**

Emerge has not only made a significant impact in my management style, but also in my personal life, and the relationships that I foster whether at work or home. I want to be a leader that leads with empathy, leading by example, while still holding everyone accountable, setting high expectations, and last but not least I want to be able to inspire others to be their very best, and to use their skills to their highest potential. Accountability is key to any organization's success, but I strongly believe that how the news are delivered to any team member can either help that team member learn from the lesson, or have a very negative impact on their behavior. The empathetic delivery has made a noteworthy difference amongst the team members within my portfolio; it allows the team member to learn from the mistake, and it allows me to brainstorm with them and to come up with innovative ideas to ensure the error is minimized as we move forward.



## Coaching/Mentoring for the New Hire

I decided to give it the title “Coaching/Mentoring for the New Hire” because we have all been in a situation at a new company where we feel that we have to sink or swim, and it is not a good feeling when you are the brand new kid on the block. The program will ensure that coaches/mentors are identified beforehand based on their strengths, and once a new member is hired, then he/she will be assigned a mentor that they can shadow, and train with for 12 months. The mentor/coach will be available for any questions regarding policies and procedures, culture, point of contacts, timecards, purchase cards, etc. Even though the training is provided, sometimes just knowing that you have someone that you can reach out to in the earliest stages, can ensure that the new team member doesn't feel overwhelmed or frustrated, because the person that trains them initially is out on vacation.

## Long-Term Organizational and/or Field Impact

This program will ensure that team members know someone has been assigned specifically to them to go through their journey hand in hand, and to make the experience more enjoyable. The new team member will feel supported, and will know that an answer is just a phone call away. As an organization, it will help us to retain team members longer as the process would be seamless as he/she becomes familiar with all processes and the culture of the organization.

## Leadership Lessons Learned

The implementation of this ALP taught me that taking the time to teach someone the ropes of their position is key in their success. The new team member is eager to learn all that they can; they are a sponge if you will, and my job is ensure that I saturate the sponge with all the knowledge I can to help them achieve success and help them be promotion ready.



### Lisa Coe

Director of Environmental Services &  
Residential Transitions

**Paradise Valley Estates**  
Fairfield, CA.

### In One's Own Words...

I find fulfillment helping others meet their full potential. I am committed to having a positive influence on my team and the residents we proudly serve. I value the unique characteristics and gifts each team member brings to my organization. Using a positive, engaged and caring approach, I pride myself on celebrating the individual strengths of others. I lead the same way I live life, by seeing areas of weakness as growth opportunities.

I entered the EMERGE program eager to develop my already solid leadership foundation and determined to positively influence aging services. The EMERGE Program was invaluable. The program reinforced the importance of leading – instead of managing. Often we as leaders get caught in the weeds and do not see the horizon. Too many managers use people instead of developing people, command instead of ask, drive team members instead of coach. EMERGE stressed the importance of investing time in the growth of others – including investing in ourselves. The program also gave me the tools to help share these valuable concepts with those I strive to inspire.

The EMERGE Program reinforced for me the importance of motivating and inspiring others to grow within our organization. The program emphasized that leadership is a behavior, not a title. I also was reminded of the importance of networking and sharing ideas within our industry. The EMERGE mentors and fellows were a wealth of knowledge and I will forever be blessed for knowing each and every individual who participated in this incredible program.

## Lesson of Leadership (LOL) Journey

My Action Learning Program took key components from the EMERGE experience and weaved in additional leadership elements to create a “Lessons of Leadership (LOL) Journey”. The six month series involved weekly motivational and thought provoking messages and one monthly meeting. The goals of the program were to help participants blossom from managing to leading and to enhance interdisciplinary relationships. The program successfully accomplished these objectives.

Prior to the first session I shared how “The same old thinking - produces the same old results”. With this in mind, I invited all to invest in themselves by making time for this important program. During the first session interdisciplinary teams were created. The Lessons of Leadership series produced a more cohesive team who appreciate the importance of team member engagement and leading by example. After the first session I could already see interdisciplinary bonds strengthening and leading rather than managing beginning to occur. With each session it was clear that participants were growing and valuing the importance of leadership. Additionally, our organization benefited from a team with a more strategic mindset, innovative outlook, respect for other perspectives, and appreciation for the importance of leading – not just managing – at all levels within our organization.

## Long-Term Organizational and/or Field Impact

I am confident The Lessons of Leadership Journey had, and will continue to have, a positive impact on my organization. I have also shared this program with others in hopes to further positively impact the field of aging services. This program strengthened the skills of current leaders and grew managers and supervisors into engaged, innovative, leaders. Through this journey not only were leadership skills strengthened but participants learned to effectively communicate, learned the value of revolutionary thinking, and the importance of team member engagement. Participants also learned to be visionary thinkers which will allow our organization to grow in ways previously unthinkable.

## Leadership Lessons Learned

Through the Lessons of Leadership Journey I learned to never underestimate the abilities of others. We must invest in our teams and help each member reach their own personal best. I also experienced how rewarding it is to mentor others and the joy of seeing them succeed.



### Julia Earley

Volunteer Coordinator

**Sunny View Retirement Community**  
Cupertino, CA.

### In One's Own Words...

A leader has the drive and passion for the cause they desire to promote. To be an effective leader you must convey your goal in a way that motivates, encourages and enables those around you. I empower those around me to move the project forward by scaffolding when needed, working alongside them, or allowing them to take the lead and following. I am a very animated and passionate leader. I strive to find opportunities to experience growth as an individual and as a professional. My participation in the EMERGE program was a truly extraordinary experience in my professional journey.

EMERGE helped me build on my own strengths and develop further in areas of opportunity. EMERGE challenged me to learn more about myself and gain knowledge and skills such as effective ways to communicate. Through this journey I have built meaningful relationships and connections with fellow colleagues. I take away an appreciation for the opportunity to discuss issues and differing opinions as well as building on like-minded goals that will at its core benefit the senior services we provide. EMERGE has asked me to reflect as well as plan ahead in my career with seniors. I am grateful for the process as much as the outcome EMERGE offers and anticipate exploring and implementing my action learning project.



## **Community Partners: Building relationships with corporations and local businesses through volunteer engagement.**

As a nonprofit organization we welcome the great energy, talent and generosity of volunteers. Sunny View understands that we are a part of a larger community and would like to stay connected with our neighbors. Corporations and local businesses are also looking to build their social responsibility in the communities they engage in. My ALP is further developing the partnership between our retirement community and the neighborhood to create engagement for corporations with seniors through volunteer opportunities within our community.

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

It is my goal, through developing partnerships with corporations, that Sunny View will continue to enhance their resident services and engagement with the community and the corporations will be inspired to develop their social responsibility regarding aging services. I envision using my experiences and knowledge gained through the EMERGE program to directly help the residents of our community, as well as strengthen our connection with the greater community and build a louder voice through advocacy for aging services.

## **Leadership Lessons Learned**

My ALP is currently in the beginning stages. I am looking forward to using the different tools EMERGE has provided to build the relationships and connections with the businesses.



### Michael Easbey

Assisted Living Director

**The Samarkand**

Santa Barbara, CA

### In One's Own Words...

I worked in restaurant and beverage management for 10 years before moving to The Samarkand and beginning my career in aging services. I left the restaurant world with the desire to find non-profit work that was focused on helping the community. After a short search, I stumbled upon a social services assistant position and took the job. After it was learned that I had years of leadership experience, I was moved into my current role.

I have always desired to lead with positivity and kindness, but in order to do so effectively, we need to often reflect on our daily interactions with our team, ask ourselves how we are empowering our team, and always be searching for new tools to help us grow in our roles. EMERGE has reignited a fire that had long since been extinguished by daily business, deadlines, and life in general. It reminded me that my chief responsibility as a leader is to lead and the best way to lead is to walk beside every team member.

EMERGE has taught me that self-reflection is a vital aspect of my role. I must be consistently working to better myself. Not just at work, but in every aspect of my life. Through EMERGE, I have learned to take a more holistic approach to my job. We often compartmentalize our lives into work, home, hobbies, etc. But I have learned that what I do, who I am, and how I approach every aspect of my life affects my leadership. What a valuable lesson!

## Lost in Translation

My action Learning Project is to help our large number of Spanish-speaking staff receive information in their native language, starting with staff meetings. Most of our employees speak English, but many of them speak English as a second language. I believe that receiving information in Spanish will lead to a higher understanding of information as it is disseminated, create a stronger sense of community in the workplace, and will clearly communicate how essential these employees are to residents and management.

## Long Term Organizational and/or Field Impact

This change will help implement large policy shifts, communicate valuable information, and train staff on proper procedure. Our company, Covenant Retirement Communities, is dedicated to our mission statement and core values. Being able to share the mission and values of the company to the staff in their native language will drive home these principals in a much more effective manner.

## Leadership Lessons Learned

Change happens slowly. This process will take time. I would like to see all communication to staff offered in English and Spanish, but we will start with one thing at a time. We plan to either have a translator providing real-time translation to staff in our quarterly staff meetings or provide a separate meeting time when the information will be provided in Spanish. Eventually, I hope to broaden the scope of the project. I have also learned to hear others ideas for implementation. I had a very firm idea of how I wanted to get this done. After hearing from our Executive Director, Laurie Small, and other colleagues, I have a better understanding of challenges and roadblocks. Leaning on the wisdom of co-workers will create a better project outcome.



### **Megan Foster**

Health Services Administrator

Sales Counselor

**Valle Verde, HumanGood**

Santa Barbara, CA

### **In One's Own Words...**

The EMERGE program has made a profound impact on me both personally and professionally. Through the program I've learned to be more authentic, vulnerable and transparent, and found that taking risks are necessary for success and growth. I better understand the importance of taking a collaborative approach towards challenges and projects, and I have more tools to use while working within a team setting. I've grown to appreciate that an effective leader does not need to have all of the answers, and does not have to "go it alone", but rather, relies upon the expertise and assistance of those around them. Just as important, I was reminded that encouragement and recognition is paramount to building a strong, cohesive team, and to cultivate future leaders.

EMERGE allowed me the time and space to be introspective and build upon my self-awareness. Being a part of this program gave me the courage and confidence to identify as a leader, and to recognize that I have the capability and passion to be a great leader. Now more than ever, I feel I have a moral responsibility to positively impact those around me. Because of the EMERGE program, I will forever strive to have a positive influence on others, and to help ignite their passion for leadership and growth.

As a result of EMERGE, my emotional intelligence has matured, and I've been truly inspired and motivated to be an all-around better person, in both my personal and professional life. That, to me, is priceless.



## Pursue Your Passions

Human connection is at the core of what we do in our line of work. Without sounding too existential, life is about having purpose and being able to give back and serve others. It is no mystery that social interaction and having a purpose in life significantly contributes to longevity and quality of life.

I intend to create a program to assist in igniting our incoming residents with the motivation and optimism of pursuing their passions and finding their purpose within our community. In turn, I believe they will feel empowered, will have a positive transition into our community, connect with others on a deeper, more purposeful level, and in turn, live a longer, more fulfilled life.

## Long Term Organizational and/or Field Impact

I'd like this program to illustrate that the ability and opportunity to make an impact, and leave a legacy does not end at any point in life. Rather, moving to a retirement community can be a starting point, and a great space to ignite new passions, interests and motivation in people.

I am envisioning that new residents would receive a questionnaire that is private, and framed in such a way that could provide a space to be introspective, and really hone in on the activities and/or subjects they hold a true passion for, or would like to cultivate a passion for. The questionnaire will contain thought-provoking questions, to allow each person to explore their true desires, and aid in identifying the skills, talents, goals, mission, etc. that they could ideally share with fellow residents and/or team members.

## Leadership Lessons Learned

It excites me that this program has the ability to promote each resident in working toward self-fulfillment and overall life satisfaction.



**Jane King**  
Operations Director  
**St. Paul's PACE**  
San Diego, CA

### In One's Own Words...

I have found that being my authentic self, defines who I am as a leader and that being true to myself and my values is my key to successful leadership. My strength is the self-assurance that I can be a leader, and my humility to admit when I make frequent mistakes as one, creates my style that is believable to others. Being believable to others helps me build trust and rapport and improve my leadership capabilities. EMERGE exploited the vulnerabilities we all bring as individuals to the work place, and helped me build the confidence around my areas of vulnerability to be a stronger and more confident leader.

This past year at St. Paul's Senior Services, I have been involved with the training by the Gallup organization on the Strengths Based leadership model. As an organization, all employees assessed the organization and leaders through the Gallup Q12 survey. A major outcome of that assessment and a lesson learned by myself, is that employee engagement is so very important to positive organizational outcomes. EMERGE further substantiated that concept with lessons taught to be yourself with your staff and demonstrating that when you care about those you work with through ongoing communication, and embracing others' vision and values into decisions and processes, employee engagement with leadership and the organization is improved.

The biggest impact EMERGE has made on me as a leader is the acknowledgement that I am a better leader when being myself and true to my values. I am a believable leader because I care about others, I engage others in the direction and outcome of decisions and most importantly, I want to improve, learn and grow by being transparent with others on challenges I am experiencing and being receptive to feedback for my own improvement. St. Paul's PACE mission to care for low income frail seniors allows me to be my authentic self and stay true to my values that caring for others, either the staff or the seniors we serve, will always be the foundation of my leadership style.

## Individual Strengths Collectively Make Teams Stronger

My Action Learning Project aims to highlight and incorporate the individual strengths of all team members at St. Paul's PACE, as assessed by the Gallup Strengths Finder, into as many areas of the work environment as possible. In 2017, St. Paul's Senior Services received grant money to partner with the Gallup organization to receive training on their Strengths Based leadership model. One tool provided is their assessment survey which all employees at St. Paul's could access to gain an understanding and a summary of ones' individual Top 5 Strengths. The concept is that knowing your strengths and being able to leverage them in your work, you will be a more engaged and productive employee to the organization. To date, most employees at St. Paul's have taken the assessment but little has been done with the information. My project intends to achieve the following goals:

- Disseminate the strengths of individuals across the organization for all employee awareness through a variety of modalities.
- Provide education on what the individual strengths mean and how to leverage those strengths for improved employee engagement at work.
- Incorporate the individual strengths of team members into performance evaluations as a way to standardize the strengths language and highlight how individual strengths contribute to the organization.
- Contribute to the corporate leadership development plan that recently obtained additional grant funding to continue leadership development of strengths based leadership at St. Paul's Senior Services.

## Long Term Organizational and/or Field Impact

I believe that the long term impact of embracing the Strength Based leadership model and incorporating individual strengths into the milieu of teams will increase outcomes for the organization including reduced employee turnover, increased referrals from employees for candidates for open positions, increased internal promotions and improved safety outcomes for the staff and the seniors we serve.

## Leadership Lessons Learned

The roll out of my ALP is just starting with the dissemination and education portion of team members strengths but I know that in order for this to self-sustain and be successful over time, I need leadership and staff to buy into the process and engage them in all the steps along the way.



### **Sarah Leck**

Resident Service Coordinator  
**Fern Lodge, HumanGood**  
Redlands, CA

#### **In One's Own Words...**

I used to say that I have leadership potential or that I have the skills to be a leader one day. I thought a leader was someone “in charge” or in a supervisory role. Through EMERGE, I have realized that this is not true at all.

EMERGE helped me realize that I am a leader in my community no matter my role. I have learned that leaders are always learning and seeking ways to grow. This should be a never ending pursuit and there will always be skills that I can hone to become a better leader. Leaders are adaptable. Being able to adjust and have patience when needed is a crucial part of leading through the constant changes in senior services. I have also learned that a good leader depends on their team. No one person can do everything alone and it is important to put minds together to reach a goal. The process may be challenging at times, but the outcome will be so much better than doing it alone. One day, I do hope to be a supervisor who is compassionate and continues to support other future leaders. Through the skills I have learned in EMERGE, I have learned that I am a leader. I will lead in my current role; through the support of my amazing team, to make my community a place of positivity and compassion for our residents.



## GOOD Community

My ALP is three fold.

GOOD Community will be a yearlong program, including quarterly events to promote positive resident interactions. Each event will focus on one of “The Four C’s” which include:

- Community: focus on resident engagement and accountability
- Communication: emotional intelligence and communication styles
- Compassion: understanding how bullying, gossip and mental health impact their community
- Culture: embrace residents from different backgrounds

The events will include a combination of information, discussion and fun activities. GOOD Ambassadors will be residents who take ownership of this challenge and be the representation of positive interactions in their community. I am creating this curriculum in a way that it can be adjusted and implemented in any HumanGood Community.

## Long Term Organizational and/or Field Impact

The goal of this program is to encourage unity and respect in our communities. Senior bullying occurs in all communities and this program hopes to counteract this. By focusing on embracing our differences and enhancing our similarities, I hope this program will empower residents to take ownership over their communities and realize that they can make positive changes. The team cannot do this alone. The GOOD Ambassadors will be the residents who pledge to be the examples of a welcoming and gossip free community. This program can be implemented into any HumanGood community so that all of our communities are places of positivity and growth for all our seniors.

## Leadership Lessons Learned

The leadership lessons that I anticipate to take from this program will be that both team members and residents realize their own leadership potential. As I learned through EMERGE to lead where I am, I hope that those who participate in GOOD Communities will learn the significant and positive impact that they can make in their own community. I hope that people learn how to communicate with people who may communicate differently; and to embrace both the things that make us all different and similar. I hope our residents will learn to be compassionate for others and for ALL to be good ambassadors in our communities.



## **Cammille Lo-Li**

Regional Social Services Manager

**Covia**

Walnut Creek, CA

### **In One's Own Words...**

Over many years of working in aging services and with disabled people, I have learned various ways of team work and building relationships from the front line all the way to the management levels. I strongly believe, in order for me to be an effective leader, learning to build stronger relationships with people of different backgrounds and from different walks of life has helped me to grow stronger in the aging services field.

I expect to learn more new skills at EMERGE such as navigating small group projects, asking “softball questions”, recognizing the impact of leaders, communicating effectively and building relationships. Being a great leader is easy but being a consistent leader requires practice and making mistakes until you can make it right. Also, I expect to learn how to balance one's professional and personal life. My goal is to inspire more future great leaders by passing on the skills I have learned from the EMERGE program.

## Younger Generational Mentorship Program

My ALP is to expose a new generation to the aging services field through a mentorship program. This program will allow younger people the opportunity to work at affordable housing communities through an internship or volunteer program. It will provide learning opportunities about many different jobs that are available in aging services including:

- Information Technology
- Social Work
- Fitness/Health & Wellness
- Activity Coordinator
- Administration
- Accounting
- Developer
- And many more...

The program participants will be given a mentor that works in their desired field. For 2000 hours, the participant will shadow their mentor and learn different aspects of the job. Participants will be exposed to our residents, cultural differences, leaders within the community, and have the opportunity to gain professional and leadership skills.

## Long-Term Organizational and/or Field Impact

Many younger people choose high tech or medical field positions, but they do not realize the work they do in other areas can also make an impact on the lives of older people and people with disabilities. So, I strongly believe that if we start to provide more opportunities for the younger generation to explore our senior communities through internships or volunteer placement they will have the desire to work in our field. I'm hoping that by taking this program they will pass the desire to work with older people on, generation after generation, and continue the cycle with the generation that follows.

## Leadership Lessons Learned

Through my EMERGE journey, I have learned not about how we manage ourselves, but more importantly how we lead those that we have been supervising or mentoring. How we impact people tells the story of what kind of leader you are. A true leader's legacy should be to imprint people, teams, and organizations with something more meaningful and lasting.



### **Gina Manansala**

Administrative Services Coordinator

**Carmel Valley Manor**

Carmel-By-The-Sea, CA

### **In One's Own Words...**

Although my experience within the senior living industry has only been four years, Carmel Valley Manor has opened my eyes to the diverse types of communities that are across the country and to the support that seniors need. My position here as the Administrative Services Coordinator has helped me recognize the operations of a senior living industry not only from a financial aspect but how each department can come together to provide the daily needs of our residents.

I feel I have learned a great deal about myself as a leader through the EMERGE program. I've put into practice to listen beyond what was being said and take into consideration that people's statements or ideas are more than just outspoken words. I've also learned that leaders are not required to have all the answers. The EMERGE program has given me a multitude of tools to draw on as I make progress in my career and life.



## Employee Excellence Handbook:

My ALP is to create a level of quality handbook for our management team. This 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 goal with this project is to bridge the gap between employees and management. We, as leaders, sometimes feel like we are sinking under the weight of our own workload. We sometimes neglect to realize that our team is available to us and that we can count on them more. We tend to try to do things on our own because we have the mindset of "if you want it done right, you've got to do it yourself." Our staff could do an excellent job if we would just educate them, give them the right tools, and then provide the support to help them be successful. I am hoping that this handbook will give all our managers the knowledge and skills to be exceptional leaders. Motivating 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 company 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.

## Leadership Lessons Learned

I believe if we have a strong workforce supported by a mission driven management team, we will be able to go 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.



### **Cristina Mendez**

Resident Care Manager

**Casa Dorinda**

Santa Barbara, CA

### **In One's Own Words...**

In my current position as Resident Care Manager at Casa Dorinda I have the privilege of interacting and collaborating with every department. I have great confidence in my abilities to accomplish my work to the highest standards, be reliable, efficient and a positive team member. Over the past few years I have grown and evolved in my position and as a leader. It has been challenging at times, however, I have found it best to always lead by example and empower others to want to give their best. These attributes have helped me find my voice and to lead with integrity.

The EMERGE leadership program has made a significant impact on my leadership journey. It has given me the confidence to use my voice and has introduced new and effective leadership styles. The EMERGE program encourages you to be innovative and search for new effective ways to lead. It drives you to find the best version of yourself, improve and reshape your thoughts, and it provides you with leadership principles and models to promote successful environments, but most importantly it encourages you to empower others to be successful. Lastly, you will network with others in your field and build lifelong friendships.

## New Resident Orientation

My Action Learning Plan is to formally implement a New Resident Orientation program that addresses and revisits the information that initially attracted them to our community. Once residents have moved into our community there tends to be a gap where I feel residents are not fully connecting to services offered. This often leads to residents being misinformed or the loss of independence. This orientation will bridge this gap and serve as a platform to outline services in detail as well as how to initiate them. The orientation will be a one on one visit with new resident(s) in their apartment to discuss their personal transition to our community and all that Casa Dorinda has to offer. It is an opportunity to discuss what I refer to as all things Casa. The idea of offering a personal orientation vs. a group setting is to encourage each resident to discuss concerns that are personal to their needs that otherwise may not be discussed in a group setting. It allows residents to ask questions that pertain to them personally and allows me to address concerns in a way that is personal and meaningful to each resident. It is also an opportunity to discuss our person centered care philosophy, how every department may interact with their care, how to initiate clinic services and support, and what to expect in the event they have a medical EMERGENCY. In addition, it's an opportunity to discuss their goals and how to maintain an active lifestyle on and off campus. Overall, this orientation serves as the beginning of a great relationship.

## Long Term Organizational and/or Field Impact

My long term hope is to see this program continue to provide a seamless transition for residents, especially for those that are new to the area and Casa Dorinda. Since the commencement of this orientation process I have noticed how beneficial it has been not only for residents, but for our organization. It truly has become a great opportunity to learn about each other and how Casa can be of service in the smallest way yet make the greatest impact. I would like to see this program evolve, adding orientations to our off-campus residents who are also entitled to services.

## Leadership Lessons Learned

During the implementation of my ALP, I learned to ask softball questions to peel away the layers and to truly understand resident needs. Residents are more informed, inquiring about services and offering suggestions on how to improve and address their changing needs. I also learned that in order to improve our service and resident experience we must first listen and be willing to change. This is a great opportunity to find ways to improve our services and maintain quality into the future.



### Jessica Montes

Director of Resident Services

**MonteCedro**

Altadena, CA

### In One's Own Words...

I would like to believe that as a leader in my community I bring integrity, compassion and positivity to the relationships I form and the situations I encounter. I am also certain that there is always an opportunity to grow as a leader and a person regardless of title, years invested in a company or career success.

I consider integrity of self to be of the utmost importance in a leadership role and life in general. The combined display of outward actions and inner values guide my moral and ethical compass. I believe that even in the smallest of decisions, doing what is fair and just is of utmost importance. I think that making an error gives an opportunity to self-reflect and re-evaluate how to proceed as a leader. The ability to continue growing and learning is essential to becoming a role model for others. Showing your team that perfection is unrealistic fosters a more trusting and comfortable work environment.

I believe that the EMERGE program has helped me identify and cultivate my unique leadership style; suiting both my personality and the role I hold in my community. As a person who would self-describe themselves as introverted, I believe the knowledge and perspective gained from EMERGE has emboldened my confidence and helped me to expand my comfort zone. I am especially grateful for the relationships I have formed with my EMERGE peers.

After having the privilege of participating in the EMERGE Leadership Development Program this past year, I can certainly attest that I am now of a different leadership mindset. EMERGE has truly inspired me to lead from the heart and has confirmed that even in a corporate workplace, leadership can and should be personal and genuine.

## Managing Grief in the Workplace

During my years working in senior living, I have noticed a gap in education and attention surrounding the topic of death, dying and grief in the workplace. To address this gap, I developed a training program for staff that focuses on how to manage professional grief and how to communicate with those in the dying process.

I believe that professional grief is real grief and is essential to address in order to avoid employee burnout. This program provides an opportunity to learn about professional versus personal grief, how to maintain professional balance and how to develop healthy coping skills when experiencing loss in the workplace.

Additionally, this program will help staff learn how to communicate with dying residents and their families in a compassionate and supportive way. There is naturally some worry about how to approach residents and their families during the dying process and after a death and this program provides a helpful reference on what to say or not to people in these difficult situations.

## Long Term Organizational and/or Field Impact

With this program, my hope is to alleviate some of the emotional burden staff experience by validating feelings, providing healthy coping techniques and teaching about best communication practices with those grieving. In this ever growing field of senior care, it is essential to keep our employees healthy and informed.

## Leadership Lessons Learned

I have provided this program to several groups of employees and felt that overall the participants have responded positively and welcomed an outlet to express their professional grief. There has also been an encouraging response to the portion of the training on how to talk with and support others in grief—namely the piece on what to say/not say. In conversation about such a serious topic, I learned that as a leader it is crucial to make yourself vulnerable and speak from the heart in order for others to feel at ease with expressing themselves.





## Yvette Ochoa

Administrator

**Valley Vista Senior Community**

San Ramon, California

### In One's Own Words...

I define myself as an understanding, compassionate and caring leader. I have been working with older adults in Affordable Housing for 17 years. During these 17 years of service I have learned to go the extra step to ensure that all work and deadlines are met.

I am very grateful for the opportunity given to me to attend the EMERGE Leadership Program.

I was fortunate enough to meet and work with a diverse group of people from all over California. EMERGE showed me how other professionals lead and this program has helped me with my self-confidence, communication and listening skills.

EMERGE also took me on a personal journey, through this I have learned to speak for myself and defend what I believe in. Being a leader is letting my residents & team members know I will always be there to listen to them with any issue or concerns they might want to talk about. My residents and team members know I am here for them, to guide in the correct direction, and also to motivate them in a positive way.

## Bids for Improvement Manual

My Action Learning Project is to have a binder with bids for improvements to the community.

- The binder will have multiple projects needed at the community throughout the year.
- This binder will have the bids from three vendors. Each vendor will be provided with an identical work scope job description letter.
- Once vendor returns the offer bid, it will be reviewed carefully making sure all of the work to be done is quality work and affordable.
- Once reviewed, a decision will be made based on the best offer for the Affordable Housing Community.

## Long Term Organizational and/or Field Impact

The Leadership lessons that will be learned during the implementing course will be that with this Community Improvement Bid Binder the communities will save money and use those funds to enhance the residents' lifestyle by adding more activities and programs to the communities.

I hope the impact of my Action Learning Project can be implemented at other Affordable Housing Communities.

## Leadership Lessons Learned

My Action Learning Project is still in development, once finished I will present it to my superiors. I truly believe I will get support from them to go forward with this plan. I believe this plan will help save money and benefit in many areas for elder adults and other Affordable Housing Communities.



### Antonio Roque

Dining Room Supervisor  
**Plymouth Village, HumanGood**  
Redlands, CA

#### In One's Own Words...

I started as a server in the dining room, advancing to relief supervisor, and am now dining room supervisor and I'm not stopping there. I am committed to Plymouth Village. I have learned many things in my 10 plus years here. The EMERGE program helped me learn to not just be a manager, but to also be a leader. Everyone learns differently and to lead is one of the best ways to learn. I sometimes go home thinking "Did I finish everything?" or "Will my team know what to do without me?," but I know longer think that way. I lead my team to show them how to get the job done when I'm not there. One of my biggest challenges was change and with the EMERGE Program I learned that change is good and we all benefit from it.

## **In their shoes (Dining with Residents)**

I came up with this experience with another copartner. It would give my dining room servers the opportunity to sit with a resident or residents and enjoy a lunch or dinner with them. This would help them learn the residents' likes and dislikes. It will be a great experience for my team to be served and learn from any mistakes from other team members while also having a great dining experience with our residents.

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

- 1: to better serve the Residents
- 2: to learn the likes and dislikes
- 3: for the team to lead new team members

## **Leadership Lessons Learned**

The leadership lesson I learned while developing my ALP is to always think outside the box to better serve my residents. A big requirement is patience and the right team to support you. Listening to the residents is also a big requirement to better serve them.



### Paige Ryan

Executive Director

**Eskaton Village Grass Valley**

Grass Valley, CA.

### In One's Own Words...

I am a collaborative Executive Director who is known for being calm, consistent and encouraging. I am quick to celebrate employees' successes because we build positive energy and a happier, more engaged culture. I believe in educating and coaching whenever possible. I engage the team in offering their opinions and to brainstorm on items as often as possible. I serve with integrity and compassion while striving to ensure that the highest standards of quality and care are being provided to those who are depending upon us. I enjoy supporting the team so that we can all serve our population to the very best of our abilities.

Through LeadingAge CA's EMERGE program I have learned the importance of being fully engaged in my work while also recognizing that taking time for self-care and energy renewal is critical to continued success. I have learned that managing my energy is more important than simply managing my time. I must be mindful of my physical, emotional, mental and spiritual energy in order to provide the community my best efforts. I have learned the importance of setting up rituals that will aid me in these efforts.

The EMERGE program also taught me the importance of giving others an chance and to live in the realm of possibility; to be more positive in my initial judgments and challenge my perspective. From reading and discussing the book, "The Art of Possibility" by Rosamund Stone Zander and Benjamin Zander I learned that in difficult moments when a leader is challenged one can choose despair or possibility. Do we focus on the challenge as if it's an obstacle or can we view it as a possibility? The example I have thought of the most from this book is the story of how two marketing executives went to a region in Africa where people were not in the habit of wearing shoes. One marketing executive saw a hopeless situation and the other saw a great business opportunity.

LeadingAge CA's EMERGE program has also reminded me to recognize that each person on the team wears their own type of thinking hat which brings different and valuable perspectives to the table. I really enjoyed partnering with my fellow EMERGE classmates to discuss the books we were reading and engage in the group projects and presentation.



## Enhancing EMERGENCY Preparedness at Eskaton Village Grass Valley

Enhancing EMERGENCY preparedness at Eskaton Village Grass Valley is my action learning project because senior living communities are vulnerable to any number of disaster situations. The devastating wildland fires throughout California have shown how critical it is for senior living communities to be as prepared as possible. Every moment counts during time-sensitive EMERGENCY situations. Another sad fact is that active shooter scenarios happen in all types of homes and businesses, including senior living communities. Power and utility outages, bomb threats, earthquakes, floods, landslides, tornados, and tsunamis are all potential threats to the health and safety of all who live and work in senior living communities.

Residents and employees continued welfare and safety is of paramount importance. The goal of this action learning project is to ensure that Eskaton Village Grass Valley prepares as much as possible and practicable so that, should any type of disaster situation arise, a quick and appropriate response can occur. By expanding our education about EMERGENCY situations and how to respond to each should aid our efforts during a real moment of disaster. Having regular drills will allow all to gain an understanding and comfort with how to respond during an evacuation or shelter-in-place situation.

## Long Term Organizational and/or Field Impact

I hope that the long term impact of this action learning project is that Eskaton Village Grass Valley will continue to expand upon its EMERGENCY preparedness. Turnover of both staff and residents is a fact that must be acknowledged, so it is critical that continual education and practice of a variety of disaster and EMERGENCY situations occur regularly. Employees will learn about EMERGENCY procedures upon hire and then practice during monthly drills. Inservices will also be held to review disaster plans and supplies on-hand. Residents will learn about EMERGENCY procedures when they move into the community. They are also encouraged to participate in monthly drills. Resident Town Hall meetings will occur throughout the year so that residents can learn more about how to prepare and respond should an EMERGENCY evacuation or shelter-in-place scenario need to occur. My hope is that employees, residents and their loved ones will enjoy a greater peace of mind by having a working knowledge and level of comfort in how to respond during EMERGENCY situations.

## Leadership Lessons Learned

It was an important lesson for me to give myself permission to schedule meetings with employees, residents and their loved ones knowing that I would not have a set agenda with all of the information and answers to questions that might be asked about EMERGENCY procedures. While there were certainly plenty of written policies and procedures in place to be shared the purpose of the meetings was to engage in a collaboration of thoughts and ideas about how to prepare for EMERGENCY situations. There is such a power in the process of collaboration because each person brings their knowledge, experience and unique perspective to the table as well as their questions and concerns. Eskaton Village Grass Valley's EMERGENCY preparedness plans are now much more comprehensive thanks to the thoughts shared during these collaborations



### Jordan Shanahan

Administrative Assistant

**Plymouth Village, HumanGood**

Redlands, CA

### In One's Own Words...

When I started the EMERGE journey, I did not consider myself a leader. Through each session, I have learned more and more tools that continue to help me with my leadership skills. I believe that as a leader you are never truly done learning, and you should always be open to suggestions. EMERGE has shown me how to feel more comfortable and confident about my capability and knowledge in the field of aging services. Not only has EMERGE helped me in my professional life, it has helped me deeply in my personal life. I have learned so much about myself than I thought was possible. I learned that no matter what problems lie ahead, I am in the driver seat. EMERGE has taught me that building strong relationships with others is key.

## **PV's 3 P's: Personal-Passionate-Purposeful**

My Action Learning Project is to develop a team member appreciation group. Team members are the foundation to running a successful community. Plymouth Village's 3 P's is a committee of individuals who recognize the need for team member acknowledgement and understand the personal connection, the purpose and passion it takes working in a continuing care community.

We will attend Connects throughout campus in various departments. There we will present in person a paper version of a team member's online recognition. This will boost team member confidence and also give others a desire to go above and beyond for our residents and colleagues. We have already begun distributing anonymous cards that contain inspirational and uplifting messages. I would like to publish a "featured employee" section in our monthly newsletter that the residents of Plymouth Village receive. This would encompass a brief description of themselves, how long they have been a part of our community and lastly what they like most about working at Plymouth Village. We currently have quarterly potlucks, an activity I hope to continue, but I would also like to launch short monthly gatherings for team members to pop by the designated location and grab a treat or play a quick game of some sort. Just taking those few minutes to interact with other departments for a fun event creates better communication and relationships throughout departments.

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

I hope that PV's 3 P's will show team members how much they truly are appreciated. I want to give each individual a voice to share thoughts that they have for events on campus. In the long run, I hope that this committee will continue to grow with ideas and ways to acknowledge others. Whether that is in random acts of kindness or team building activities.

## **Leadership Lessons Learned**

When implementing my Action Learning Project I have learned that uplifting others will create a better outcome for all. At one of our EMERGE sessions we talked about "being the vessel". You have to be who you would want on the other side of the desk. I feel that when doing these small but meaningful gestures, we are bringing our community together as one.



### Aireen Tibon

Executive Director

**The Parkview Assisted Living and Memory**  
Care, Eskaton  
Pleasanton, CA

### In One's Own Words...

I have had the opportunity to grow with The Parkview since 2007. Eskaton has given me the chance to participate in EMERGE to enhance my leadership skills. As a leader, I support my colleagues through their aspirations and achievements. I walk with them through their journeys to strengthen their skills and talents. One cannot be a leader if they are only managing the employees. EMERGE has helped me massage my leadership skill by dynamically empowering and positively engaging employees.

## Career Development

My Action Learning Project is creating a career ladder to help develop employees within the company. Since I have had the opportunity to grow within my organization, I believe in creating career ladders for other colleagues who are looking to expand their skills. Most people have a desire to continue to grow in a profession. We are empowered to cultivate our skills and talent within an organization who will support us. Career ladders help employees gain knowledge and skills that may take them to the next level. This helps create a well-trained workforce by providing training, continuing education, and a mentor who can help guide the flourishing employee. Creating a career ladder for employees is a win-win for both the employee and employer. Employees feel valuable in an organization when their employers are invested in them. This in return shows employers loyalty and dedication from the employee. A career ladder motivates a team and can help boost staffs' morale. It inspires employees to look at where they want to be and work towards their goal.

When organizations have career ladders, it shows that they value their employees. It is certainly what I have felt being employed with Eskaton through these years and I aspire to support my colleagues who are also looking to develop their careers.

## Long Term Organizational and/or Field Impact

The long-term impact for my Action Learning Project will inspire others to develop skills from existing employees in the organization, retain employees, and promote growth. As Eskaton is growing, it is crucial to train employees to also grow within the organization. Eskaton has an excellent reputation with longevity with their employees, both entry-level and executive level. Creating a career ladder will be a formal method to continue longevity in the organization.

## Leadership Lessons Learned

Upon creating my Action Learning Project, it required collaboration from peers and expertise from a variety of professionals to provide insight and support. As my project is still at the early stages, I anticipate to absorb more lessons along the way. During my course through EMERGE and creating my Action Learning Project, it has helped me strengthen my flexibility and balance my professional obligations. I have discovered my potential to further my skills in programs that tug at my heart for the benefit of the organization, my peers and ultimately for the seniors we care for.





### **Rosa Torres**

Human Resources Manager

**Los Gatos Meadows, Covia**

Los Gatos, CA

### **In One's Own Words...**

Through the EMERGE program I learned titles do not make us superior. Titles help others know our role within the organization, but true leadership is shown by how we treat and inspire others. A leader must take the time to listen, sympathize and hear the needs of others, while treating others with respect no matter what job that individual holds. When we treat others with respect and let them know how important their position is, they will be grateful and respect will grow. EMERGE has taught me how important it is to thank team members for their dedication and hard work.

With EMERGE I already have expanded my network. I have met people that I know I can count on to expand my knowledge and skills. I realized my EMERGE family is not only there while we are in the EMERGE program but will be there in the future to provide advice and support. I know that these people are people I can lean on if I ever need them, and vice-versa if they need me. These strong bonds were built because we had a common goal – to learn, to lead and help others. I want to build that level of bond within our organization.

## Improving Management and Leadership Skills

My goal is to teach and train management that in an organization we are all a team. A leader is one of the most important positions in any organization. A leader is there to guide and help position others to achieve goals and objectives. Leaders are compassionate, honest, and fair and must treat all team members equally. Leaders demonstrate active listening skills, and respect diversity. Dealing with people with different background, age, and ethnicities can sometimes be challenging. Not all people are alike; therefore, not all approaches should be handled the same way. However, within this framework of sensitivity, all should be treated equally. Taking the time to know individuals, study the situation and finding common ground allows leaders to be able to determine the best approach for each unique situation. I firmly believe that these attributes and behaviors earn respect from all stakeholders within the organization – team members, management, and residents.

## Long Term Organizational and/or Field Impact

By taking the time to know individuals, study the situation and finding common ground, leaders can determine the best approach for each unique situation. I firmly believe that these attributes and behaviors earn respect from all stakeholders within the organization – team members, management, and residents.

## Leadership Lessons Learned

I learned through EMERGE that all things are better and more successful when we work toward a common goal. I know I cannot make the suggested changes alone. Changing a culture and strengthening our leadership team and style must be done as a team. I have grown to be passionate about the difference between leading and managing. True leadership is essential.



## Shirley Turner

Director of Sales and Marketing  
**Hillcrest**  
La Verne, CA.

### In One's Own Words...

EMERGE has created opportunities and encouraged me to grow as a leader. My idea of growth is embracing the new information and incorporating into your life and daily practice, especially when it is difficult and uncomfortable. EMERGE is a pool of learning opportunities alongside new colleagues of whom are at different stages of their careers. This past year has encouraged me to look outside of myself more often and be aware of others life experiences. Where they are in their journey is the sum of who they are today.

I'd like to share highlights and abstract thoughts that come to focus over past year with EMERGE: I strive to be the leader I want to lead me; most people want to be part of the bigger picture and a collaborative group; I must accept that there will be down times which are what makes good times great; we must take root in our beliefs and values; be responsible in all aspects is a part of leadership; as a leader you must know what you value and who you are; people want to serve a higher purpose beyond themselves; when people serve together for a common purpose, any goal is attainable.

This experience has impacted me personally in many ways. I know the strength I have and the strength to weather hardships and lead even when the future is unknown. I understand that leading can be painful due to the decisions that may cause pain in the process.

The EMERGE program absolutely shaped my ideas about being of service and has brought out the best in me at this point in time. I have opened myself up and accepted myself – even when knowingly others do not. I have better defined my own values and lead daily with a compassionate and a vulnerable heart. I bring joy to the team and trust them with an open heart which in turn creates strong team.

Leadership is the opportunity to use your role as a platform for change or to enhance or create a system in your community to better lives

Finally, the definition of leadership is the ability to influence a group towards the achievement of goals. Leadership is not a one size fits all approach but a matter of adapting your approach to best fit a specific situation, follower or group.

Above are some of the tools and ideas that are a basis for leading change and are the underlying tones of my Action Learning Project.

## A Successful Move – A guide to Move Affirmation

The focus of my project is moving and affirming a move to retirement community for elders. Most people think moving is picking up your physical belonging from where they are and placing them in a new or different place. They are right! But there is so much more to moving successfully when you are older.

A later in life stressor is more difficult to deal with. According to website the Health Status, one of the top 5 stressors in one's life is moving (Health Status, March 2019). Others include: death of a loved one; divorce; a major illness and job loss. Moving is stressful for anyone, however the age of person can exacerbate the stress of moving. According to Deborah Stone of [www.myageingparent.com](http://www.myageingparent.com), "Moving home is one the most stressful experiences in anyone's life. However, when you are younger and stronger, it can be easier to cope with. However, later in life, it can be a difficult to move. Sometimes it's viewed as an unwanted move and without sympathetic help and support." (Alliance, March 2019).

A move later in life move might be peppered with many issues that make a move difficult; however, we should not forget the mountain of fear that make a move mentally and emotionally more difficult.

On the front end of deciding to move is the fear of making a wrong decision. Fear can plaque the mind. There are many things to fear when considering a move such as making the wrong decision, loss, the unknown or change. Here are some top topics that have come to the surface in discussions with people who are considering a move.

Fear of loss manifests itself as personal attachment to the physical house and belongings and many memories attached to the house of so many years. This creates other fears such as "Will I lose my life connections or memories?". Most are moving from a home they have lived in for over 40 plus years, raised their children in, and have many happy memories. A home is the connection to their life's work and history.

Fear of the unknown and loss of familiar surroundings such as extended community also arise. Questions come up such as "How will I manage this change?", "How will I re-learn the area?", "Where will my stuff or my furniture go?", "Will it fit", and "Who will want my family heirlooms?" People are used to their surroundings and feel they know where everything is located both in the home and local surroundings. They are comfortable with the familiar.

There is also fear of new surroundings and people and being accepted into a new community i.e. "How/Will I fit in?".

To help minimize these stressors (fear of loss, the unknown and adjustment into new community) I present three strategies of affirmation to help minimize the fears as one prepares to move.

### **Two very important factors in the move equation are:**

1. It is important to know that the move process should mentally begin before the move is required.
2. The most successful moves begin 6 to 12 (or more for some) months before the physical move happens. Residents must be mentally preparing for the move.

### **Three Strategies of a Positive Move**

Let's address each of the three fears with a following strategy to minimize the fear and create a useable path for a successful move and affirmation of the decision.

Fear of loss – personal attachment to the physical house, belongings and many memories attached to the house of so many years. This creates other fears such as, “Will I lose my life connections or memories?” Most are moving from a home they have lived in for over 40 plus years; raised their children in; and have many happy memories. A home is the connection to their life's work and history.

Both the community and the new resident together seek a successful transition. This begins by the person contemplating the move to make many meaningful visits to the community well before the final decision and the actual move. Success begins in visiting the community many times and days whether special events or taking a stroll through the community on days when there is very little activity, visiting each area, spending time in the restaurants and the surrounding community. Obtaining a wide view of the community is important to their transition and can minimize any unexpected surprises. This will help the person become familiar with the community over time and will raise questions that they will have the opportunity to have answered before the decision and move is made. This process will include repeat visit opportunity for friendships to be made in this process with both staff and current residents. This is the beginning of laying down new roots/connecting with the community and the road to affirmation of the choice to move begins.

Fear of loss – personal attachment to the physical house, belongings and many memories attached to the house of so many years. This creates other fears such as, “Will I lose my life connections or memories?” Most are moving from a home they have lived in for over 40 plus years; raised their children in; and have many happy memories. A home is the connection to their life's work and history.

Early conversations should begin in defining what is “home.” These are personal conversations and often can be sensitive. It's important to include a team of people in the transition discussion. The beginning message is to help reveal that home is not necessarily where your belongings are, but where your social connections and community are located. The first strategy of spending time in the new community (if it's the right fit) ties right in to this second strategy. Spending time in a community creates a connection and over time and you may find yourself authentically liking, even loving, the community over your periodic visits. Memories will begin to form from your new connections. This can take some time and can happen at different times for people. The more time you can spend discovering the new community the more possibility you have to hone in on what interests you in the new community. Remember having these new connections can and will help with the transition.

### **Here are two cases of people I have served in their decision to move.**

**Case one:** Mr. and Mrs. Perry moved to Hillcrest from a neighboring city where they lived over 40 years. When they decided it was time to start looking for a retirement community, they took the time and spent time at Hillcrest. They attended several events and explored social possibilities that were available to them. When it came time to move, they shared that it would be difficult to leave their home after so many years of memories spent with good friends. About 6 months after they moved, Mr. Perry shared with me that he would often drive past his house, just to see his old home and one day unexpectedly drove past the past house and it was no longer his “home.” He had become very involved in the new community, gardening and made social contacts of which he pre-researched and spent time prior and after the move. These greatly helped him transition. The other home was just a house now holding very little for them. They are occupied by new relationships, social connections, and opportunities at Hillcrest. I want to mention that often transitioning as a couple is a different process. Being part of a married couple can be a built-in support system.

**Case two:** Mrs. Denning lost her husband years before moving into the community. She experienced a difficult transition. She made the decision quickly (home sales were on the rise and her Orange County home sold for top dollar and fast). She was unhappy and family and staff were concerned. She was having a difficult time finding the right social connections and considered leaving Hillcrest. It was time to step in. The marketing staff went in to action. We planned in her home with other new residents with similar interest and we thought would also benefit from new connections. The gathering was a hit. Soon after that gathering, we noticed that connections began at the gathering continued. Some turned into lasting friendships. Over the next year I witnessed Mrs. Denning attending gatherings with the some of the ladies. They created a strong connection and support system. One year after the gathering in her home she shared this comment with me: “A few months ago I was driving home, and it hit me, Hillcrest is home. I see it as my home now!”

### **Fear of new surroundings and people and being accepted into a new community – How/Will I fit in?**

The third strategy is the most important. Strategy one and two set the stage for the final act. Hopefully strategy one and two have taken place already. It is very important that current residents take an active part in welcoming the new person in to their neighborhoods, Just like how in case two the current residents helped Mrs. Denning transition. Thankfully Hillcrest's campus is set up in neighborhoods. Including the current residents can often speed up the elimination of the fear of fitting in or learning how to navigate the new community. It's important that the staff assist in communicating information to current residents about the arrival of the new person early on including information such as date of move, background information, hobbies and personal information (once permission is obtained). Everyone involved should be prepared to welcome the new person. It is great if the neighborhood gathers to meet the new person more than once prior and soon after the move in date. This builds a support system for the new person, knowing where to turn to when immediate questions need answers and guidance on new systems. Over all the goal is to build a safety net, community, connection and a social network for and with the new person. The goal is to foster the successful transition. These steps will help the person affirm their good decision of the choice to move. This will not only affirm the move but help minimize some of the prior fears.

The strategies are not rigid and are a guide and overview on how a successful transition can happen. Each new person is different with different needs. Some will want more shepherding and others will require less. When and how much support a new person may need/want will be determined as each relationship develops.





### **Bernadette Viray**

Sales and Marketing Assistant  
**Sunny View Retirement Community**  
Cupertino, CA.

#### **In One's Own Words...**

Being in EMERGE has shown me the importance of being real. Leadership is about people, it has nothing to do with any title, position or rank. It has everything to do with how I inspire others through my actions. I now look at challenges from a different perspective, turning my weaknesses into strengths.

EMERGE gave me the essential skills and techniques to becoming a leader. These skills help me lead, persuade and influence people. It helped me understand who I am and what I can do as a leader. I learned the importance of humility, to be a great support to my team, and to lead by example. I also learned that a simple gesture of gratitude can motivate a person.



## Summer House through Memory Bridge

Dementia is a general term for a decline in mental ability severe enough to interfere with daily life. We may notice some changes where our love ones might have their clothes backwards or they may be searching for something and cannot remember what it was. People with Dementia live moment to moment, needing routine. They lose words and things become hard to process. The language they had always known, surroundings and the people they love are suddenly foreign to them.

Memory Bridge is a program that connect people with Dementia to family, friends and other people in their community. Memory Bridge teaches us how to connect with people who have dementia, and reveal memories not erased by the disease.

With the support of the Sunny View Foundation, Sunny View began implementing the Memory Bridge Training program with participants that include staff, residents and family members. The three day training with Michael Verde, Founder of Memory Bridge, teaches them how to connect with people with Dementia. His perspective is that people with Dementia are disconnected from their family and community and through this training, people can bridge those connections again.

## Long Term Organizational and/or Field Impact

“Memory Bridge addresses basic fundamental human values that may sound so trivial but can be so profound and important for every human being, more so in a business like ours where caring for a resident comes from the heart, [and] can be so much more satisfying not only to the resident but to the care giver as well...” quote from one of our “Bridge” sessions.

I am part of a team in the process of making Sunny View the center for this wonderful program. We have two sessions and train thirty people a year. My goal is to have staff from Front Porch’s Summer House (Memory Care) participate and experience this life changing program, and to educate and train participants on how to connect with our residents in a deeper emotional way. For the next sessions, my role is to market and promote this wonderful program not only to our staff but to other retirement communities.

## Leadership Lessons Learned

“Summer House through Memory Bridge “ is a long term project. As an EMERGE fellow, I will be utilizing the tools I’ve learned from our facilitators, coaches and colleagues.



### Mary Vo

Director of Health Services

Unit Coordinator

**Carmel Valley Manor**

Carmel-By-The-Sea, CA

### In One's Own Words...

I started my career as a Certified Nurse Assistant 15 years ago. I was excited with the possibility of learning ways to help family members cope with ill and aging parents. My father had a stroke when I was in the 6th grade and I was thrown into the world of caregiving for my father. I was overwhelmed with all the needs my family had to suddenly perform. My brother had to move back and live in our house in order to care and lift my dad for his daily care. I saw how a family responded and all the needs elder care requires. It set me on the path for my life.

Following high school, I entered Monterey Adult School and passed the CNA course. I worked at Carmel Hills Care Center for my first year, which followed with my opportunity to work at Carmel Valley Manor. As the years have passed, I have had the opportunity to learn new tasks within this company. People have come to respect me as a “can do” person. I evolved into the right-hand woman for my boss, the staff, as well as, the residents in the unit. Working on their behalf, I have gained their respect. I am a versatile leader.

EMERGE has been a great new experience for me. It has strengthened my personal growth. It has stretched my comfort zone. With the leadership skills I have learned, I am better at understanding elder care issues and challenges they face. EMERGE has taught me various ways to provide leadership amongst my coworkers with respect and kindness regarding senior care. I am able to respond differently to situations which in turn others can learn also.

We need to be able to adapt to new situations. I believe change is good. I am challenged to focus on issues my company experiences and understand the policies to provide correct information to the staff. As a leader, I believe it is important to provide an environment where questions can be answered, and people can be heard.

## Ancillary Services “A Helping Hand”

The goal of Ancillary Services is to provide necessary care for residents to remain well and independent. Most residents want to stay in their home and usually resist the challenges of transitioning to an Assisted Living or Skilled Nursing Facility. With this service they will receive one on one attention, assistance with their activities of daily living, errands, housework, even proposed downsizing, etc.

## Long Term Organizational and/or Field Impact

Of course, I hope residents are able to live well longer, as independently as possible and be able to be a positive resident in the community they have chosen to live.

## Leadership Lessons Learned

Creating change takes vision. It takes more than recognizing change is on the horizon, it takes the ability to read situations, to gather pertinent data and to consider all those involved. There is also recognition that one must not only identify but pursue others on the team in moving a project forward. Through EMERGE, I have realized that you need all the “hats” present. You need to be comfortable seeking input, considering the ideas yet keep your vision in creating a better system. An effective leader recognizes there will be ups and downs in the process and in so doing encourage your teammates. The ALP I have chosen allows me interaction with other Managers/Directors. I found that when I am prepared and listen, I can ask good questions. I can make a difference. I am confident that my participation in this project allows me to grow as well as offer Carmel Valley Manor a great service.

I am grateful to be part of something so significant.



### Elisa Walker

Director of Resident Services

**The Covington**

Aliso Viejo, California

### In One's Own Words...

I have always considered myself a servant leader and strive to break down the barriers between management and staff. Through EMERGE, I discovered more about myself as an individual and as a leader and have learned so many amazing ways to engage my staff and support them. In leadership, there is sometimes the temptation to be all about the title and status but EMERGE promotes the opposite. As leaders, we're here to serve our staff and ask what we can do for them. Additionally, EMERGE has taught me the value of the holistic person and that my personal life is just as important as my professional life. What I do is just a small part in the greater scheme of things, it shouldn't define me.

I have also seen a positive change in my personal and professional relationships. I place a greater emphasis on being fully engaged with my staff and actively listening to what they have to say. I've noticed they feel more comfortable approaching me when issues arise, both with work and personal. I've also become intentional in my personal relationships and make it a point to seek people out.

The most impactful thing about EMERGE for me has been the friendships I've developed. I knew going into the program it would be a good networking opportunity but little did I know I would be making lasting friendships with people who shared the same passion as me. My "Delta 8" group has been life-changing and so encouraging. These women are the kindest, strongest, most intelligent women I have ever met and have been so supportive in my journey this past year.

I am confident the values I've learned over the course of this past year will continue to positively impact me and those around me. I cannot thank my organization enough for giving me this opportunity; it has truly been a blessing and a life-changing experience. I can honestly say EMERGE has made me a better person.

## Mentoring Matters

It's no secret that the Baby Boomers are retiring at a fast rate, which means more Millennials in the workplace. Having experienced this myself, most Millennials do not know what they want for a career and may have never thought they would land in the field of aging services. This is the basis for my ALP project and why I wish to pursue this. Our younger staff may enjoy their work environments but not know what they want to do exactly. A mentorship program would prepare individuals for a variety of vital roles within our community, expanding their knowledge in the field, and enhance leadership skills with hands-on experience. My first management experience was awful; I was thrown a set of keys and was told to figure it out. This is sadly the rule not the exception but it doesn't have to be like that.

## Long Term Organizational and/or Field Impact

As time goes on it will get harder and harder to procure good employees who want to serve long-term in this field. By taking our younger staff as mentees, we are not only allowing the opportunity to grow them into future leaders but have a greater probability of them staying in this field long-term. It will also give them the chance to learn from some of the best leaders our community has to offer.

## Leadership Lessons Learned

Although my ALP project hasn't been fully realized yet, the EMERGE program has been an invaluable resource for me. I've gained priceless skills to help me achieve my goal of instituting a mentorship program at my community. While my goal is to develop our younger staff individually, it will serve the community as a whole. We will retain our younger staff longer and will hopefully expose them to a field they never dreamed they'd have the opportunity to work in, let alone lead. EMERGE has taught me that, as leaders, one of our goals should be to empower our staff to become leaders themselves. "A star wants to see herself rise to the top. A leader wants to see those around her become stars" (Simon Sinek).





### **Kristen Wanner**

Resident Services Specialist

**HumanGood**

Pleasanton, CA.

### **In One's Own Words...**

The field of aging services is one of the fastest growing industries in the Country. For the past eight years, I have had the opportunity to work beside leaders who are inspiring and motivating. These leaders have one thing in common, they are all graduates of EMERGE. When I was accepted into the EMERGE program, I knew I was about to embark on a life changing experience. Before I started the EMERGE program, I attended a Leadership Retreat where the facilitator posed a very important question to the class, “Are you a leader”?

The EMERGE program has thus far been a rewarding experience that has given me the confidence to say yes, I am a leader! Throughout this process, I have learned that a leader is someone who uses their strengths and knowledge to influence others to achieve a greater good. Leaders are inspirational and visionaries who create an environment where people feel valued and appreciated. Most of all, leaders are motivators who mentor and advocate for their team members. Being a leader does not have to do with a title or position that one holds within an organization. It's about taking action and keeping team members motivated.

EMERGE has given me the techniques, knowledge and tools to be an effective leader within the field of aging services. EMERGE has empowered me to find my authentic voice and understand the different types of leadership styles, including my own. I thrive on inspiring those around me and I will continue to do so as my career progresses. EMERGE took me on a journey of self-reflection and I will be forever grateful for this amazing opportunity.

## Resident Services Orientation Process

My Action Learning Project is to develop a new Resident Services Orientation Process. I want to create and implement a new onboarding process for all of HumanGood's Resident Services Coordinators. As you can imagine, the first day in a new job can be very overwhelming. The purpose of the new orientation process is to enhance the current process and provide a new Resident Services Coordinator with all the necessary information and tools needed to perform their job. The new Resident Services Orientation Process will consist of four components:

- Orientation Checklist – A checklist consisting of all the steps that need to be taken before a new Resident Services Coordinator starts, all the way through their 90 day probation.
- Welcome Packet – The packet will consist of community specific forms and resource numbers.
- Mentor Program – The purpose of the program is to assign a seasoned Resident Services Coordinator with a new Resident Services Coordinator to mentor them through their first year with HumanGood.
- Resident Services Portal – The portal will consist of links to AASC Online, Resident Services Manual, HUD Resident Services Manual, Resident Services Directory, power points and various templates.

## Long Term Organizational and/or Field Impact

My hope with my Action Learning Project is to improve the Resident Services Coordinator orientation process and create a tool that all future new Resident Services Coordinators can utilize. I want to ensure that new team members have a smooth transition into their new role and not have the feeling of being overwhelmed. With the creation of the Resident Services Portal, all Resident Services Coordinators will be linked to resources with a click of a button.

## Leadership Lessons Learned

I am in the process of implementing my Action Learning Project. In order for this project to become a reality, a committee was formed, which consists of three Resident Services Coordinators and one Resident Services Supervisor. Two of the Resident Services Coordinators on the committee are relatively newer team members who have been able to provide valuable feedback and suggestions, since they recently have been through the orientation process. The committee will continue to have ongoing meetings until the new orientation process is rolled out.

Throughout this process thus far, I have learned to delegate and lean on others who have the expertise on this subject matter. I was able to utilize the Mind Mapping tool when the committee started brainstorming on what we wanted the new orientation process to look like. As I continue to work on my Action Learning Project, I plan to implement all the lessons I have learned throughout my EMERGE journey.

## Hosts and Program Sponsors

### Sponsoring Organizations

LeadingAge California extends its appreciation to the following member organizations that sponsored Fellows to participate in the EMERGE Class of 2019:

<b>Carmel Valley Manor</b> Carmel, CA.	<b>MonteCedro</b> Altadena, CA.
<b>Casa Dorinda</b> Santa Barbara, CA.	<b>Paradise Valley Estates</b> Fairfield, CA.
<b>Covia</b> Walnut Creek, CA	<b>Plymouth Village</b> Redlands, CA.
<b>Eskaton Village Grass Valley</b> Grass Valley, CA.	<b>St. Paul's PACE</b> San Diego, CA
<b>Fern Lodge</b> Redlands, CA.	<b>Sunny View Retirement Community</b> Cupertino, CA.
<b>Hillcrest</b> LaVerne, CA.	<b>The Samarkand</b> Santa Barbara, CA.
<b>HumanGood</b> Pleasanton, CA.	<b>Valle Verde Retirement</b> Santa Barbara, CA.
<b>Los Gatos Meadows</b> Los Gatos, CA.	<b>Valley Vista</b> San Ramon, CA.

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### Site Visit Hosts

LeadingAge California extends its gratitude to the following member communities for hosting the Class of 2018-2019 site visits and panel discussions.

- **Casa Dorinda (Host)**  
Santa Barbara, CA.
- **The Samarkand (offsite visit)**  
Santa Barbara, CA.
- **Moldaw Residences (Host)**  
Palo Alto, CA.
- **Lytton Gardens Senior Community (offsite visit)**  
Palo Alto, CA
- **Paradise Valley Estates (offsite visit)**  
Fairfield, CA



## 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:



**Jerry Brown**

Senior Director of Covia Affordable Communities  
Covia  
San Francisco, CA.



### TEAM DELTA 8

**From left:** Megan Foster, Cristina Mendez, Elisa Walker, May Vo, Kristen Wanner, Paige Ryan, Yvette Ochoa, and Shirley Turner

**Camera shy:** Jerry Brown



**Mary Linde**

Executive Director  
St. Paul's Towers  
Oakland, CA.



### TEAM SMALL BUT MIGHTY

**From top left:** Mary Linde, Charles White, Beatriz Camarena, Chris Regan

**From bottom left:** Bill Penrod, Susan Ruan, Zuly Garcia-Uicab, Davina Barker, Shannon Penick-Piexoto



**Joseph Pritchard**

Director of Memory Care  
Masonic Homes of California- Union City  
Union City, CA.



### STREAM TEAM

**From top left:** Bernadette Viray, Michael Easbey, Jordan Shanahan, Lisa Coe, Joseph Pritchard

**From bottom left:** Claudia Butler, Camille Lo-Li, Rosa Torres

## Facilitators and Staff

### Facilitators

LeadingAge California is grateful for the wisdom and guidance provided to the EMERGE Class of 2018-2019 by its dedicated and committed facilitators:



**Matthew Neeley – Facilitator**

CEO/President

**Hillcrest**

La Verne, California



**Christina Cerrato – Facilitator**

Director of Operations, Affordable Housing

**Episcopal Communities and Services**

Pasadena, California

### EMERGE Program Staff



**Soua Vang**

Vice President, Education

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Director of Meetings & Events

**LeadingAge California**

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

**Jennifer Sternshein, Sanders Rehaste Sternshein & Harvey, LLP**

**Sheri Peifer, Eskaton**

**Michelle Cuevas, TELACU**

**Lea Pipes, Motion Picture and Television Fund**

**Justin Weber, Casa de Manana**



## EMERGE 2018-2019 SPONSORS

A special thanks to our EMERGE 2018-2019 sponsors, for their shared vision in cultivating high potential leaders who will inspire, innovate and educate other members in the field of aging services.





# Action Learning Projects

2018-2019