Preparing for the Passing of the Baton: Leadership Programs in Senior Living Organizations

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ABSTRACT

The Problem: With the average age of CEOs at senior living organizations rising, the senior living industry is concerned about succession planning, creating overall bench strength, enhancing employee morale, and retaining talent.

The Resolution: LeadingAge, a national association of nonprofit organizations serving older adults, addressed these concerns by developing a premier leadership program in 2006 known as LeadingAge Leadership Academy. Since not everyone will be able to participate at the national level, with the help of graduates from the national program, LeadingAge state affiliates have also developed leadership programs, and more recently, senior living organizations are developing their own. This article will focus on how the LeadingAge Leadership Academy helped inspire two member organizations to develop their own leadership programs.

Tips for Success: Senior living organizations that wish to implement their own leadership programs can utilize the structure and ideas from either or both of the programs, drawing on the skills and knowledge of their own leaders, including board members, for program content.

Keywords: succession planning, leadership, leadership academy, employee retention, employee advancement, empowerment.
INTRODUCTION

According to Bob Morrow, principal at Clifton Larson Allen, an accountancy firm with offices throughout the U.S, the aging industry “faces a serious shortage of new talent, and accelerated turnover, among its leaders. A significant percentage of executive leadership entered the field at the same time, and as many as 40% are approaching retirement in the next three to four years. At the same time, we’ve not been building our bench strength” (Sherwin, 2016). According to Brad Wachter, owner of Senior Living Recruiters, a niche search firm in the seniors housing and eldercare industry, the average director stays less than three years at an organization, and directors of nursing stay for an even shorter period of time (Sherwin, 2016). Additionally, according to a white paper from the Center for Creative Leadership (2015), “Healthcare leaders put a high value on the ability to lead others, yet there is notable room for improvement in how leaders perform this competency” (p. 12). LeadingAge can be credited with addressing this trend and these concerns by developing a premier national leadership program in 2006 known as LeadingAge Leadership Academy, a year-long experience designed to help each participant discover his/her true leadership potential. This program allows for an introspective journey, so participants explore what could be achieved together in the field of aging and human services, and additionally what can be achieved individually in member organizations. Most important, the program underscores the importance of “paying it forward” and mentoring younger and less experienced leaders. The domino effect from the LeadingAge program has been impressive, with many graduates assisting LeadingAge state affiliates in developing their own versions of leadership programs and more recently, assisting their own organizations in developing them. This practice and trend of “train the trainer,” so to speak, fits with the direction many organizations are heading, as stated by Noel Tichy, who led General Electric’s Leadership Development Center from 1985 to 1987, and authored, edited, and contributed to more than 20 books, and is now a professor at the University of Michigan Business School: “Companies are successful to the extent that they have leaders at all levels of the organization. Any institution that invests in the development of leaders at all levels is going to get ahead of its competition; however, the worst people in the world to develop leaders are professors and consultant leadership trainers. There is an industry of such trainers traveling from company to company attempting to do the job of a leader. It is the principle job of a leader to help develop the next generation of leaders. Unfortunately, many leading companies do not build good leadership pipelines because their leaders don’t do the teaching of their own managers. There are some exceptions…but they’re not common” (Allio, 2003, p. 20).

This article focuses on how the LeadingAge Leadership Academy helped inspire two member organizations, St. Ann’s Community and Mather LifeWays, to develop their own leadership programs for employees. The goal of each is to provide organizational and leadership knowledge to a variety of participants, including those who are not in managerial roles, those who manage frontline staff, and those who aspire to upper management. The leadership skills/competencies are developed through exercises conducted during the sessions, and participants are expected to take the learnings back to experiment with in their daily role. In addition, development of an Action Learning Project helps participants enhance their leadership skills. Although both programs are in their infancies, preliminary evaluations and anecdotes will be shared. Replication by other senior living organizations is encouraged, with the hope that many more organizations will see that the investment of time and resources is not just a nicety but a necessity. The field of aging services must ensure that with the tsunami of aging, there will be enough strong, invested leaders in the field to navigate the way.

St. Ann’s Community

St. Ann’s Community is a nonprofit organization that provides a full continuum of care and services designed to meet the individual needs of older adults. St. Ann’s offers several independent and retirement living options, short-term rehabilitation, transitional care, adult day services, assisted living, specialized memory care, hospice, and 24-hour skilled nursing care. St. Ann’s Community was founded in 1873 by the Sisters of St. Joseph, and keeping true to its faith-based traditions, has served the frail elderly for more than 100 years. St. Ann’s employs more than 1,200 people between two campuses, one located in Rochester, New York, and the other in Webster, New York. As health care has changed, so has St. Ann’s. In recent years, the organization found that the major changes...
in health care and services provided to the elderly left a void in attracting and retaining qualified health care professionals, specifically leaders. In response, St. Ann’s sent its first employee through the LeadingAge Leadership Academy in 2008 and has since sent another. Three St. Ann’s employees have also completed the LeadingAge New York Leadership Academy. All are still employed by St. Ann’s and one has since been promoted to vice president. With the help of these Leadership Academy graduates, St. Ann’s Leadership Academy was developed and implemented in 2015.

**Mather LifeWays**

Founded in 1941, Mather LifeWays is a non-denominational nonprofit organization that is “dedicated to enhancing the lives of older adults by creating ways to age well.” Mather LifeWays creates programs, places, and residences for young-at-heart older adults through three areas of service: senior living residences, community initiatives, and the Mather LifeWays Institute on Aging. In 2008, Mather LifeWays also sent its first employee through the LeadingAge Leadership Academy. Since that time, eight other employees have participated in either the national or LeadingAge Illinois Leadership Academy. It is an investment that the organization feels has paid off exponentially, with several employees advancing to vice president, assistant vice president, director, and executive director roles since completion, and all but one of the employees who have participated are still employed by Mather LifeWays. Additionally, several fellows have since served as design team members, coaches, and facilitators for the LeadingAge Illinois Leadership program. Being highly encouraged by the fruitfulness of this investment and being fully aware of what lies ahead in terms of retirements, the need for leadership in the pipelines, and the growth in store for this field, Mather LifeWays decided to develop and launch an internal leadership program in 2014 known as Ways to Lead Well.

**St. Ann’s Leadership Academy**

The cornerstone of the strategic framework at St. Ann’s Community is employee engagement. St. Ann’s recognizes that in order to provide the best for residents, energy and resources must be invested into employee engagement and in developing the leadership team. Three years ago, the vice president for organizational development, together with assistance from a LeadingAge Academy graduate and current vice president of operations, put together the idea and framework for the organization’s first-ever leadership development program: St. Ann’s Leadership Academy. The two worked with the director of human resources and the vice president of St. Ann’s Foundation to create the general outline and secure financial support. The objectives of the program were to identify employees with leadership potential, enhance their skill set through a structured program, and prepare them for future opportunities within St. Ann’s Community. It was hoped that intangible benefits, such as improved employee retention and increased employee engagement, would be gained as well.

The organization fully supported the program, but the content and curriculum were driven by experiences from the LeadingAge Academy as well as institutional knowledge of and leadership experiences from St. Ann’s. The first cohort was started with 15 individuals who were considered to be “up and coming leaders.” Some participants were currently in leadership roles, but most participants were not managers or leaders of departments or groups but “informal leaders” identified by peers and leaders alike as having leadership potential within their departments. Each applicant was tasked with filling out an application as well as gaining the support of their direct supervisor.

St. Ann’s outcomes following the first year of participation in the Leadership Academy:
- overall employee retention remained flat; however, there was 100% retention of all employees participating in the cohort
- employee engagement participation increased from 55% to 75%
- employee engagement index increased by 12 points
- four of 15 fellows received promotions within a year

St. Ann’s desired outcomes from the Leadership Academy included:
- improve employee retention
- increase employee participation in engagement survey
- increase employee engagement index scores
- improve leadership skills and potential for promotion for fellows
There were some basic requirements for employees to be considered for the St. Ann’s Academy: qualified candidates needed to be full-time employees of St. Ann’s Community for at least one year in good standing. They could not be in a formal leadership position at the director level or higher, and they had to commit in advance to completing the full program. Successful applicants would have to possess a history of completion of fruitful projects either within a team or on their own. They showed initiative and energy in problem-solving and displayed an ability to influence peers within their areas. The program was promoted through staff meetings, the company newsletter, and by word of mouth. A total of 51 applicants applied for the 15 spots, and St. Ann’s was thrilled with the level of interest. Through a careful, objective, and at-times subjective screening, St. Ann’s was able to find its first group.

The first year’s curriculum was ambitious. The Academy met as a group one day each month for eight months. Almost all the sessions were held off site, so that participants would not get caught up in the day-to-day tasks that could negatively impact the learning experience. Each session involved a public speaking assignment (each fellow spoke once during the year), as well as book assignments and discussions. Additionally, each session focused on a single topic for instruction and discussion. See Figure 1 for topics by session. Every session included a “Lunch with Leaders” session that was modeled after LeadingAge’s Leaders-in-Residence program. During lunch, fellows were seated with several senior leaders within the community and also St. Ann’s Community board members. This allowed fellows to interact informally, as well as make key connections with some of the most influential executives in the Rochester area.

Each participant was also charged with completing an Action Learning Project. “Innovation in Action” is an opportunity for participants to make a difference within their scope of influence, in a meaningful way, that will benefit fellow employees or the seniors served. Projects should be:

- passionate
- transformational
- collaborative
- fluid

This type of hands-on leadership development method was developed by Reginald Revans (1982) and is a “learning by doing” approach. In essence, Action Learning Projects bring together a group of high-potential employees to assess current business issues and make recommendations to the executive team (Groves, 2006). These projects were then presented at the graduation event, where leaders from across the organization were present to hear each participant’s ideas and plans. Each Action Learning Project had the requirement of having a project champion who was a leadership member who would support the concept and eliminate barriers. The projects that the first cohort came up with were varied in nature and style. One participant was a social worker who worked on implementing low-cost or free phone services for skilled nursing residents. That program actually came to fruition and was implemented within the community. Another focused on harnessing the ideas of frontline staff members by creating an “innovation team” that would propose new ideas and methods. A third participant developed a food safety and culinary skills program that was implemented.

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**Figure 1. St. Ann’s Leadership Academy 2014/15.**

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<thead>
<tr>
<th>Session One – Introduction to St. Ann’s – Basics of Leadership Theory</th>
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<tbody>
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<td>Session Two – Leadership Development Institute</td>
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<td>Session Three – Future of Health Care – Business of Long-Term Care</td>
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<td>Session Four – Emotional Intelligence – Leadership Styles</td>
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<td>Session Five – All about the Team</td>
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<td>Session Six – Project Management and Risk Management</td>
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<td>Session Seven – Creating the Culture We Want</td>
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<td>Session Eight – Graduation and Action Learning Project Presentations</td>
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“Innovation in Action” is an opportunity for participants to make a difference within their scope of influence, in a meaningful way, that will benefit fellow employees or the seniors served.
in the skilled nursing facility; this program had the impact of improving the quality of food for those residents. Each program is in various stages of completion, with some still being developed. The purpose of the projects was to provide each participant with the experience of identifying what makes them passionate about their career and their potential as leaders. It is when one is passionate and creative that real transformation starts to occur. St. Ann’s discovered through this process that implementing 15 new projects or initiatives at one time in an organization of its size was too ambitious an undertaking. For the second cohort, it was changed to four group projects, with teams drawn from the new group.

The response to this program has been extremely positive and has reinforced the importance of continuing to move ahead in making St. Ann’s Leadership Academy a core part of the organization. Michael McRae, president and CEO of St. Ann’s Community, states, “The message that St. Ann’s Leadership Academy sends to all levels of the organization, from cook to physician, is that we are committed to reinvesting in our employees. The fact that we have an Academy that can accommodate fewer than 20 participants and we have 50 to 60 applicants two years in a row speaks volumes to the impact we have made in such a short time.”

**Unexpected but wonderful outcomes from this program include breaking down barriers and silos between departments and different campuses.**

Participants have given rave reviews and have declared that the benefits from the program have had impacts reaching further than their professional lives. Unexpected but wonderful outcomes from this program include breaking down barriers and silos between departments and different campuses. Each participant has been able to establish and maintain relationships with people that they would not otherwise have a natural opportunity to work with. This improved the diversity of ideas brought to the table as organizational issues were discussed. In evaluations, 14 out of 15 participants in year one referenced one of the benefits of the program was the increased connectivity establishing relationships have provided. From informal supports to sitting on organizational committees, this program has given fellows the opportunity to interact with each other beyond the length of the program. One class of 2015 graduate stated, “The St. Ann’s Leadership Academy was not only a place to learn and grow as an individual, but it’s an avenue to break down organizational silos and encourage collaboration across the whole community. It gave an opportunity for me to get to know my colleagues on a deeper level, growing a relationship of trust and camaraderie for future projects and needs of the organization.”

The Academy has also perpetuated future growth. Two of the 15 fellows from 2016 have enrolled in master’s level programs as a result of their experience in the Academy:

“St. Ann’s Leadership Academy is really proof of St. Ann’s commitment to the growth and development of its emerging leaders. I have found that going through this process has opened my eyes to many aspects of leadership that I may not have learned had I not participated. I have been so professionally inspired that I decided to continue my education at the graduate level in health administration. Personal growth has also occurred as it has given insight into what kind of leader I am and the leader I aspire to become, at work and in my life.” - Participant, 2016

In 2016, St. Ann’s Leadership Academy is currently halfway through its second year. Through the careful evaluation of the first year, minor modifications have been made. The focus in selecting fellows changed slightly, and St. Ann’s made a significant effort to include those closest to skilled nursing residents, including several certified nursing assistants and staff nurses, along with representatives from housekeeping, dining services, and security teams. Core competencies that the nomination teams looked for included positive attitude, informal leadership ability evidenced by an ability to influence peers, and at least a partially thought-out career plan that included working in aging services. Additionally, the criterion was relaxed to include those employees who have worked at St. Ann’s Community for six months or more.

As St. Ann’s moves forward, they are able to fully see the significant impact their leadership program is having on the organization. Leaders emerge from the program with a variety of tools that will help them navigate any leadership role. They have been exposed to a variety of
leadership methods and have had an opportunity to practice such methods in a “real life” scenario through their action-learning project. Additionally, they have a new understanding of the business of health care and senior services providing the necessary backdrop to give perspective to St. Ann’s strategic plan. St. Ann’s is considering running two cohorts at the same time and making the program a part of the orientation for new leaders. As CEO Michael McRae states, “The lift that this program has given to the organization is that participants bring back learnings to the rest of their teams. This will translate into better critical thinking skills and problem-solving, resulting in improved outcomes for our elders.”

**Mather LifeWays Ways to Lead Well**

Mather LifeWays has an operating theme of “eliminating my impossibilities.” The basic premise of this is that the organization looks beyond individuals’ abilities to their possibilities as whole and vibrant people. The goal is to draw out the best in the organization’s employees, so they can draw out the best in others, including other employees, residents, and customers. Developing an internal leadership program fit with this philosophy, with the added benefit of having graduates of the national and state LeadingAge Leadership programs, along with human resources professionals who had completed and designed other leadership programs, facilitate the Ways to Lead Well program.

An application process for acceptance is used, with program participants selected by the executive team at Mather LifeWays (consisting of all the organization’s vice presidents). Those eligible for consideration are salaried management, high performers in role, and seen as potentially able to take on more responsibility in the organization. Attributes sought in potential candidates include strong decision-making ability, emotional intelligence, learning agility, and team effectiveness. Once the class is determined, the CEO personally calls the new class members to inform each of his/her acceptance. The participant groups, comprised of eight to 12 leaders and emerging leaders, meet five times for a total of 11 days during a 12-month period. See Figure 2 for program content.

![Figure 2. Mather LifeWays Ways to Lead Well.](image)

| Session One – Introduction |
| Session Two – Leading Self (Personal Transformation) |
| Session Three – Leading Others (Team Effectiveness) |
| Session Four – Leading across the Organization (Organizational Effectiveness) |
| Session Five – Leading the Industry (Organizational Transformation) |

For each session, there are assigned readings as well as self-assessments and projects. Between in-person sessions, there are facilitated group calls focused on drawing out participants’ thoughts on assigned readings.

The program includes certain key elements, including team-building exercises, limited classroom instruction on specific concepts, journaling, learning to ask high-quality questions (known as appreciative inquiry or softball questions), small group work, site visits to Mather LifeWays and other nonprofit locations, and debriefs of site visits. Meeting space is kept “sacred” and cell phones are placed in a basket. Additionally, at least one group dinner is arranged for each session to enhance participant bonding.

While Mather LifeWays’ mission is to create “ways to age

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The objectives of the Ways to Lead Well Program include:

- develop top talent leaders in role
- prepare future leaders for organizational growth
- improve leadership competencies of fellows

The program methodology includes:

- 10% formal learning, 20% learning from others, 70% experiential learning
- combination of classroom, independent, and experiential activities in role
- built-in reflection time and sharing of thoughts
- conduct experiments in role
well,” its vision is to change the way people view and value older adults. There are some interesting organizations in the Chicagoland area that are trying to change the way society views and values other groups of people, including the developmentally disabled, at-risk youth, and homeless individuals. Site visits to these organizations, with opportunities to interview their leadership, prove complementary to the learning matrix and are impactful and inspiring.

Because Mather LifeWays has three distinct areas of focus, this leadership program also provides an opportunity to better educate participants about each area with presentational overviews and tours. This is beyond what employees receive in general orientation, and it is an aspect of the program that is well appreciated.

The final session culminates in participants sharing their Action Learning Project, which is focused on identifying an area of opportunity within the organization that is of concern or importance to the participant and developing a business case to address the opportunity or concern. The participants share their Action Learning Project with the executive team before the graduation ceremony and a celebratory reception.

Resources required to start the program were fairly minimal as the program design was created internally. The costs incurred are related to room rental, meals, books, and other materials for the participants, and travel expenses for those participating outside Illinois. (Mather LifeWays has a Life Plan Community in Arizona.)

The first Ways to Lead Well cycle was from May 2014 to May 2015, and a second class from May 2015 to May 2016, for a total of 18 graduates. Two participants have been promoted since completing the program. Evaluations showed 100% of respondents stating that the program was very effective in meeting the stated objectives and participant expectations. In addition, 100% of the respondents stated that the sessions, assigned readings, and monthly calls were effective or very effective in helping them further understand themselves as a leader and improved overall leadership competency. Anecdotal evidence of the program’s success includes quotes from the following participants:

“I most enjoyed the interaction with the other leaders in the group. We have such a diverse group of leaders, and it is good to know that we have these resources to call on when needed.”

“First, I learned a lot about myself and Mather LifeWays. Second, the organization of the program into four parts—self, others, our organization, and industry—are building blocks for me. It has provided me a framework for looking at my role as a leader.”

“I am grateful to have been part of the first Ways to Lead Well leadership development program. Thank you to the design team for all their hard work on putting together this valuable program.”

One of the challenges has been the amount of time it has taken for the design team and facilitators to implement and sustain the program. Another challenge is identifying employees who can commit the time necessary to complete the program. A third challenge is the other leadership programs that Mather LifeWays has a desire to have employees involved in, including the state and national LeadingAge programs. After evaluating the potential challenges, Mather LifeWays has seen the success of the program and will be starting a new class for 2016-2017. In addition, Mather LifeWays has chosen to develop an “experience year” to broaden current graduates’ experiences through activities such as managing organization-wide projects and initiatives, shadowing

Ways to Lead Well self-assessments include:
• leadership competencies
• emotional intelligence
• personal style
• values

Examples of assigned reading topics include:
• authentic leadership
• emotional intelligence
• team leadership
• team dynamics
• organizational effectiveness
• leading the revolution
• innovation and entrepreneurship
leaders in other areas to build business acumen, and developing a “management basics” experiential learning program for first-time and mid-level managers.

CONCLUSION

It is clear that the workforce for all organizations in senior living is changing. It is to the benefit of aging services to engage up-and-coming leaders in a way that is meaningful and can help improve skills as well as relationships among a diverse complement of an organization’s staff. It is necessary to spend health care dollars more efficiently as methods of payment are changing drastically. The ability of an organization to survive the next 10 years is significantly correlated with the ability of that organization to become more and more creative in maximizing its teams’ efficiencies and talents.

“With a leadership crisis in the healthcare industry looming, organizations need to implement reliable and effective strategies to train and retain high potentials. Healthcare has traditionally lagged behind other industries in the area of leadership development. Healthcare organizations that embrace successful talent management strategies will not only increase their chances of survival in a changing and challenging environment, but they will also be better equipped to provide cost-effective, high-quality services and products” (Rubino, Esparza, Chassiakos, 2014, p. 46).

The cost of the leadership programs for both organizations has been manageable. Both organizations used existing leaders to develop the programs and teach the programs. The engagement of volunteer board members in the program at St. Ann’s has also been extremely successful in terms of the high quality of the experience and education of these leaders, and also due to the fact that all have participated on a volunteer basis, decreasing the cost to run each session. The expense has been simply the cost of rental spaces, books, other materials, and food/drink as well as the cost of back filling staff members to attend the sessions.

Both organizations report that employees who have gone through the programs have maximized the growth opportunities that have been placed before them. Some have enrolled in continuing education opportunities and some have already been promoted. The benefits not only impact participants in the program but also the leaders who develop and sustain the program. All who engage in these programs have improved their knowledge and understanding of different roles and functions in the organization. This in turn has been extremely beneficial in improving each organization’s ability to work effectively and improve employee engagement across the board. Both St. Ann’s Community and Mather LifeWays have found the implementation of formal leadership development programs to be a worthwhile endeavor. They are eager to see the long-term impact of engaging in leadership teams over a longer period of time and anticipate that turnover will decrease while efficiencies and employee engagement will improve significantly. These organizations are eager to see how the increased leadership skills and abilities impact all levels of service, with the most important improvement being visible at the level of the older adults served.

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