



What Makes an Effective EXECUTIVE DIRECTOR?

By Joel Goldman, Hanson Bridgett LLP

As the leader of a senior living community, the executive director (ED) is the one others turn to in difficult times. I want to acknowledge the incredible work that executive directors have done for the past two years under the most trying of circumstances. You have undertaken heroic efforts to keep your residents safe and engaged. **Thank you for all you have done and continue to do for your residents, their families, and your staff members.**

I've been working with assisted living, memory care, and continuing care retirement communities (CCRCs) in California for 40 years and I have had the honor and pleasure of working with an amazing array of talented EDs, but I had never really focused on the specific attributes that make someone effective in that role. After seeing the lengths to which EDs went during the pandemic, I realized that there is no single personality type that makes for a successful ED. There are great EDs who are extroverts. There are great EDs who are introverts. There are great EDs who have advanced degrees and there are great ones who have only a high school diploma. Yet despite the variations in background and personality of effective EDs, there are certain actions that lead to success.

Effective EDs Get Out of Their Office

Yes, there is paperwork that has to get done and phone calls that have to be made in private. But as a general rule, the less time that an executive director spends in their office, the less problems a community will experience. It is imperative for executive directors to spend most of their time out and about in the community, interacting with staff, residents, and visitors. My esteemed collaborator, Doug Armstrong, noted that in his role as in-house legal counsel, he frequently visits communities. In communities with few if any problems, the ED often says, "Come with me," and walks Doug through the community, introducing him to every resident and employee they encounter.

By making themselves a visible and active part of their community, an effective ED leads by example. This is best illustrated by an encounter I had many years ago. I was being given a tour of a newly opened CCRC. The executive director was Ron Covert, a retired U.S. Air Force General. As we were walking through the community, Ron said, "Excuse me," and walked about 20 feet down the hall to our left. He bent down, picked up a gum wrapper, and stuck it in his pocket. Returning to the group, he said, "I learned when I ran a base, if you don't do it, your men won't do it."

This extends to the NOC, or night shift as well. A simple but effective approach that I learned from an effective ED decades ago is to arrange for every manager to pop into the community at some interval during the middle of the night. For instance, if the community has six managers and each commits to visiting at night just every third month, a manager will be in the community during the NOC shift every other week. Managers can bring some pizza or cupcakes. This type of visit is an opportunity to provide guidance to nighttime employees and to learn from them. Ask them for suggestions on what you can do to make their job easier and make the community better.

Another benefit of getting out into the community is that EDs have the opportunity to ask their team members for suggestions on how to improve the community. Caregivers, housekeepers, and kitchen staff see things from a different perspective. Being open to and affirmatively seeking suggestions for improvement from these employees often yields great ideas.

Effective EDs Foster Strong Relationships

We all had a crash course in the importance of relationships as we faced new social distancing, isolation and quarantine requirements. When family members weren't allowed to visit

residents, relationships with staff members, including the executive director, became all the more important. But even before this, effective EDs have understood the importance of and practiced relationship-building for years.

An important relationship to build is with the community's LPA (licensing program analyst). Treating an LPA with respect and kindness is essential. Effective EDs seek their LPA's expertise and consult with them when issues arise. As we saw when COVID first hit and rules and requirements were changing at an almost hourly rate, having a good partner in an LPA is not just beneficial, but essential.

Effective EDs are also proactive in their relationships with family members. One outstanding, experienced ED noticed that one resident's daughter was feeling out of touch with the community. The ED began calling the daughter on a regular basis to report on how her mother was doing. Moreover, she got to know the daughter as a person. The ED learned that the daughter's teenage son was an elite soccer player and the ED would start conversations by focusing on the results of recent soccer games or on what was happening with college recruiting. Not surprisingly, her relationship-building with the daughter led to a better relationship with the community as a whole.

One of the most important byproducts of fostering relationships is the effect it has on a resident's care. A memory care community had a program that provided an iPod to every new resident. The executive director of the community made a point of meeting with family to find out what type of music each resident enjoyed to see what might resonate. They had recently admitted a resident who was not walking, talking, or eating. The ED found out from the resident's niece that she absolutely loved Rod Stewart so they downloaded some songs and placed the headphones over the resident's ears. At first the resident tugged at the head phones and said, "What is this?" But then she put the head phones back over her ears. She started to sway slowly to the music. Her movement intensified and she was clearly bopping to the beat and smiling. Within a matter of days, she was walking, talking, and eating.

Providers who take the time to build relationships with residents and family members have the opportunity to create a wow experience with simple adjustments to services. Another ED told me about their respite program and how they made a point of learning in advance about the interests of each resident in this program, even if they were only staying for a short time. In one example, they found out that the resident was a huge Notre Dame fan. In advance of her stay, they managed to get hold of a Notre Dame pennant and football program and placed them in the room prior to the resident's arrival. She felt such a sense of belonging that, after her stay, she decided to move into the community on a permanent basis.

Effective EDs Seek Out-of-the-Box Solutions

Above all else, effective EDs are flexible. They deal with a wide range of unpredictable problems and those who respond in a creative fashion or who try new approaches are more likely to be successful.

The administrator of a community got to know a local police officer. Through their chats, he found out that police officers often wrote up their reports while parked at a nearby convenience store parking lot.

A lightbulb went off in his head. He let the police officer know that he and any of his fellow officers were welcome to use the community for their report-writing anytime, day or night. Of course between the parking lot and a lovely, warm assisted living community with a comfortable lounge, clean restrooms, a pot of coffee and snacks, the choice was pretty clear. Officers started to show up at the community to write their reports. The ED had his staff put out snacks for the officers at night. Residents and family members loved having the police officers in the community. And perhaps most importantly, whenever that community needed assistance from the police, they tended to get a rapid, positive response. Fostering good relationships with law enforcement, emergency responders, chambers of commerce, local political figures and the like can be invaluable to providers.

Another area where effective EDs think outside the box is when meeting residents with dementia where they are. One of my clients had a resident who had become agitated and had a suspected medical issue. The community needed to get him to the ER and told him so. The resident became agitated and said that he would only go to the military base hospital. The ED called an emergency transport vendor with which they had a good relationship, and who they knew had an understanding of the needs of older adults, including those living with dementia. When the two paramedics showed up a short time later, they were both wearing military garb. They saluted the resident and told him that it was time to go. His agitation disappeared and he went with them to the ambulance. The emergency transport vendor had called ahead to the local hospital so that when they arrived, the admitting nurse also saluted. The resident was treated and released all without incident. By meeting the resident where he was and relying on the strong relationships built with vendors who also understand the needs of individuals with dementia, the ED was able to get the resident the treatment he needed.

Actions and Results

While these stories and examples were all from pre-2020, we have seen these actions play out since then as well. In countless moments, big and small, executive directors have taken action to lead their teams through difficult times, make sure that residents continued to receive quality care despite restrictions, and maintain those most important relationships with family members and care partners. Thank you to the administrators, general managers, and executive directors of California's communities for proving every day that actions speak louder than words. ■

Joel Goldman is a partner at Hanson Bridgett, founding board member of CALA, and a nationally known expert on assisted living.

ADVOCATES IN

action

By Maddie Robbie

CALA is happy to bring back this regular feature to the *News & Views* where we are able to celebrate the amazing advocacy work you've done. We hope these stories inspire you to get involved and amplify our collective voice.

CALA'S 2021 ADVOCATES OF THE YEAR



Terry Ervin, Vice President of Operations for Oakmont Management Group, went above and beyond in helping to plan and execute Assemblymember Kevin McCarty's visit to Oakmont of East Sacramento in November. Ervin worked with residents to gather townhall questions ahead of time, led the Assemblymember on a tour of the community, and so much more. CALA is thankful for Terry Ervin's hard work and dedication in helping to pave the way for current and future visits from legislators to CALA-member communities.



Justine Ortiz, Executive Director at La Vida at Mission Viejo, has continuously worked to foster relationships with her legislators. In November, she arranged a visit by Assemblymember Laurie Davies. Ortiz created a dynamic, interesting tour for the Assemblymember and made sure that she had the opportunity to interact with residents on an individualized level and get to know them personally. Justine Ortiz went above and beyond to build a beneficial relationship with Assemblymember Davies, and CALA is honored to recognize her.

ADVOCACY DAY

This year, over 90 CALA members participated in over 45 meetings during CALA's 2022 Virtual Advocacy Day. CALA members learned about CALA's priority legislation, built meaningful relationships with their legislators, and worked with legislative offices to further CALA's legislative goals. CALA members helped make the voice of Assisted Living, residents, and this model of care heard in the legislature.

THE ADVOCACY ACTION CENTER

To make advocacy even easier for CALA members, CALA launched a new Advocacy Action Center this year. Now you can easily look up your legislators, send letters, and successfully advocate for your community. To get started, head to CALA's website (www.CAassistedliving.org) and click on "Advocacy Action Center." If you have any questions or want to get involved, email Maddie@CAassistedliving.org.

