LOVE & DISCIPLINE

The Missing Leadership Blend in Senior Living

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This eBook was created by the Senior Living Think Tank. The Think Tank is a group of senior living leaders brought together by James Lee, CEO and Co-Founder of Bella Groves, a membership based dementia care and training organization based in San Antonio, Texas. Bella Groves includes a Memory Care Facility and Dementia Care and Support Organization based in San Antonio, TX.

This eBook was the culmination of 2.5 days of focused work meant to help the industry train and recognize leaders. eBook authors include: Rebecca Cline, 12 Oaks Senior Living; James Lee, CEO and Co-founder of Bella Groves; Monte Pedersen, The CDA Group, LLC. Kim Rosengren, Markentum.

We care. We are in the business of care. We care about the people within our business.

These are standard-issued acknowledgments that most leaders of the senior living industry make when stepping into their charge. Could the principal ingredient of our profession's specialness also be our Achilles heel? While words and the vaguely supported leadership concepts of passion, care, and love are ubiquitous in how we advise leaders to be servants, the cold hard truth is that our industry struggles in effective leadership.

The evidence of that struggle hangs in the air of familiar conversations from corporate offices to senior living communities about staffing challenges, occupancy challenges, turnover challenges, reputation challenges and so on. The answer is better leadership.

Committed, talented, and high-quality leaders are integral to the success of any organization, including that of a senior living community. Given the significant challenges that both leaders and the senior living industry face, it's essential for these communities to understand what leadership is and learn how to recognize and foster it within their staff.

Leadership expert and author John Eades defined leadership as the ability to "empower, inspire, and serve others in order to elevate them over an established period of time."[1] It is a verb and not a noun; it is influence and not a position or title. And it is rare to find leaders and leadership teams that ascribe to this definition and its meaning.

In most organizations, many are confused about the roles of leader and manager. The reality of business today is that we need both managers and leaders within our ranks to succeed.

[1]Eades, John. Building the Best—8 Proven Leadership Principles. McGraw Hill, 2019.

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If we were to ask 100 people what the differences between a manager and a leader are, we would get 100 different answers. The distinction can be best described in the following graphic by George Wethersby:

Leadership	Management
"Leaders are people who do the right thing."	*"Managers are people who do things right."*
	Warren Bennis
Leadership is about coping with change."	*"Management is about coping with complexity."*
	John Kotter
"Leadership has about it a kinesthetic feel, a sense of movement...	*Managing is about 'handling' things, about maintaining order, about organization and control."*
	Kouzes & Posner
"...Leaders are concerned with what things mean to people.	*"Managers are concerned about how things get done."*
	Abraham Zaleznik
"Leaders are the architects...	*Managers are the builders."*
	John Mariotti
"Leadership focuses on the creation of a common vision...	*Management is the design of work... it's about controlling..."*
	George Weathersby

Adding one final description from management expert Tom Peters: "Management is about arranging and telling, leadership is about nurturing and enhancing."

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If the senior living industry is to meet the challenges of today and tomorrow, it is essential that it learns to grow and develop leaders. Why are we missing this element? The answer for senior living is multi-faceted:

- A majority of the senior living industry is comprised of small businesses, which typically have less formal leadership frameworks and formal leadership development plans

- Ineffective leadership exacerbates industry problems such as staffing shortages and retention, which is often cited as the top problem facing our profession (83% of organizations place a high level of priority on "employee engagement and retention"[2] according to a 2022 SHN article).

- New or first-time community-level leaders do not receive leadership development and training

Leadership Styles are a Blend of Love and Discipline

Critical to the future of the senior living industry is the ability for executive teams to know and understand their personal leadership styles. These leadership styles vary by person and can be learned or adopted. When these styles are known and recognized, people can work on improving their leadership skills with an eye on becoming their best.

In his book, **Building the Best—8 Proven Leadership Principles**, leadership expert and author John Eades identifies five distinct leadership styles. These leadership styles differ from personality profiles in that they are never permanent. Eades states that every leader has one predominant style but can flow in and out of any style to meet specific situations.

The five leadership styles detailed below as part of a matrix model include two axes: Discipline and Love. Eades defines Love as the ability to contribute to someone's long-term success and wellbeing. Discipline refers to a leader's ability to promote standards to help individuals choose to be at his or her best. In this model, effective leaders exhibit a combination of high Love and high Discipline.

The lower left quadrant of the model represents those leaders with a base level of ability to use Love and Discipline skills while the upper right quadrant identifies leaders who exhibit a higher level of both. This matrix is unique in that it includes a fifth quadrant, called Support. This style falls squarely in the middle of the other four styles and identifies those leaders who demonstrate an equal of balance of both Love and Discipline.

[2]Woodka, Mark."Senior Living Leadership, Workforce Surveyed Share Thoughts on What Works for Retention." Argentum 13 Mar. 2022.
https://www.argentum.org/magazine-articles/senior-living-leadership-workforce-surveyed-share-thoughts-on-what-works-for-retention/

The specific styles and their descriptions follow:

HIGH

DISCIPLINE

RULE   ELEVATE

SUPPORT

MANAGE   PLEASE

LOW

LOW   HIGH

LOVE

Manage. A leader with a **Manage** style demonstrates low levels of Discipline and Love. They tend to be leaders in title only, are more execution focused, and see their position as one of having power and authority. This leadership style typically results in individuals working for the leader rather than following the leader. Leaders with a **Manage** style tend to believe that they make the best decisions.
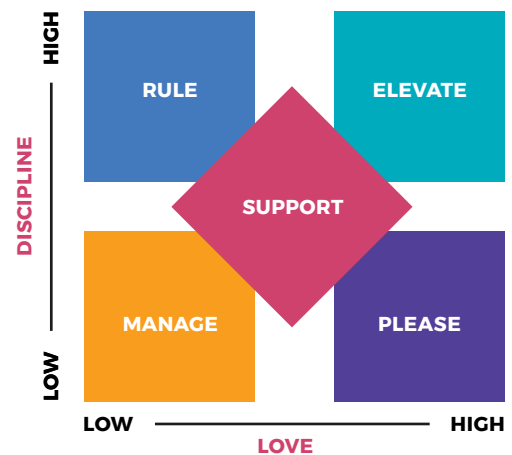
Please. A leader with a **Please** style rates low on Discipline and high on Love. These leaders are typically uncomfortable in a position of authority, avoid conflict and show a high level of caring for others. Individuals who lead with this style often get taken advantage of by their direct reports and colleagues, get passed over for promotion, and tend to underperform. This style leads to employees liking the leader as a person, and not respecting their professional role.

Rule. A leader with a **Rule** style rates high on Discipline and low on Love. Leaders with this style value authority over relationships and releasing control makes them uncomfortable. Leaders within this model create an environment where decisions are funneled to them so that they do not lose control. They like to follow a set of rigid rules and can realize really good or really bad results quickly. Leaders with a predominant **Rule** style have difficulty sustaining success due to employee burnout.

Support. A leader with a **Support** style has good, but not great leadership skills. According to [Weaving Influence](#), 47% of leaders fall into the **Support** style. These are leaders who are able to build relationships and meet business goals, but struggle taking the business to the next level. They score in the mid-range of love and discipline and are regarded as solid contributors in most organizations[3].

Elevate. A leader with the **Elevate** style scores high on both Love and Discipline. They are looked up to by others and lead teams effectively to get results. **Elevate** leaders often act as mentors and excel at creating other leaders. They are able to elevate others and exceed goals and objectives, while also building deep relationships with their team members. **Elevate** leaders have a positive impact in the lives of the individuals that they lead and are best positioned to guide their organizations to achieving collective goals and objectives.

[3]Weaving Influence. (2020, January 16). 5 Leadership Styles and the One that Outperforms them All. SmartBrief. Retrieved December 6, 2022. https://corp.smartbrief.com/original/2020/01/5-leadership-styles-and-one-outperforms-them-all#:~:text=Elevate,lives%20of%20those%20they%20lead

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How Leaders Elevate

Can leadership skills be learned? Absolutely. The Center for Creative Leadership identified the six most common challenges that leaders face[4]. We flipped them to identify the critical skills a leader needs to influence work and lead effectively. Outlined below is additional information about how to use each foundational element and an example based on the following scenario:

A recurring and well-known situation in senior living today is to drop a new leadership member or team into a struggling community. The nature of the struggle could vary from financial underperformance and chronic employee turnover to a challenged reputation in the market. Many struggles of senior living communities are interrelated.

Develop Managerial Effectiveness

Effective leaders have strong managerial skills that are relevant to their responsibilities. These include skills for prioritization, time management, and even strategic thinking (The Top 6 Leadership Challenges Around the World).

The 7S Framework by McKinsey is a tool that can help leaders develop their managerial effectiveness. It identifies seven key organizational elements that must be aligned for the organization to achieve its goals.[5]
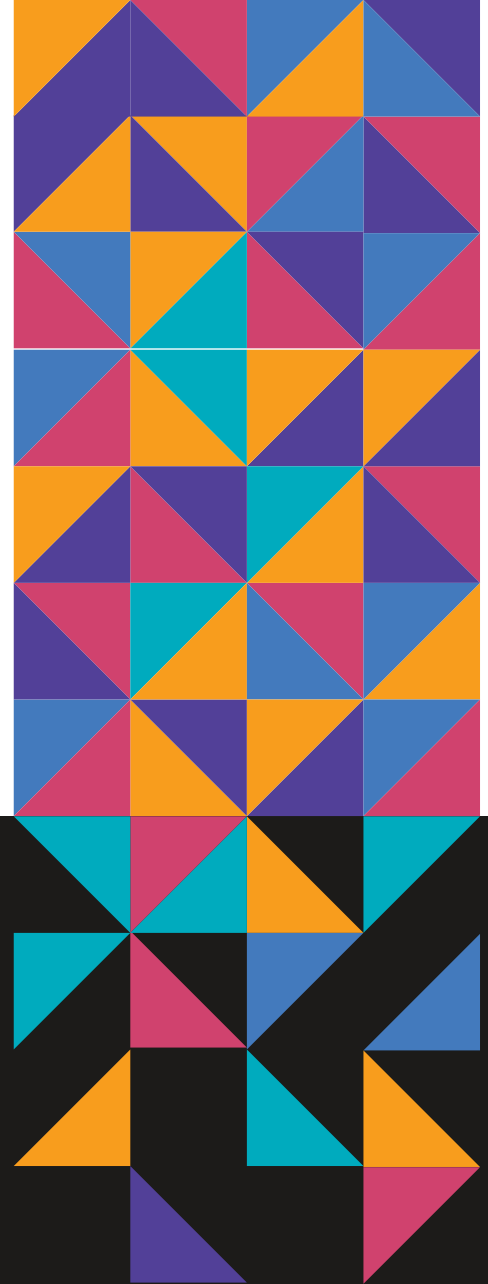
[4]The Top 6 Leadership Challenges Around the World." Center for Creative Leadership. 24 Nov. 2020. https://www.ccl.org/articles/leading-effectively-articles/top-6-leadership-challenges/

[5]Jurevicius, Ovidijus. "McKinsey 7S Model." Strategic Management Insight. 16 Aug. 2022. https://strategicmanagementinsight.com/tools/mckinsey-7s-model-framework/

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Strategy is a plan developed to achieve sustained competitive advantage and successfully compete in the market

Structure represents the way business divisions and units are organized and includes the information of who is accountable to whom; it is the organizational chart of the firm

Systems are the processes and procedures of the company, which reveal a business' daily activities and how decisions are made

Skills are the abilities that the company's employees perform very well including capabilities and competences

Staff includes the employee type and count the organization needs and how they will be recruited, trained, motivated, and rewarded

Style represents the company's management style—the way top-level leaders manage, act and interact, as well as their symbolic value

Shared Values, the core of McKinsey 7S model, are the norms and standards that guide employee behavior and company actions and thus, are the foundation of every organization
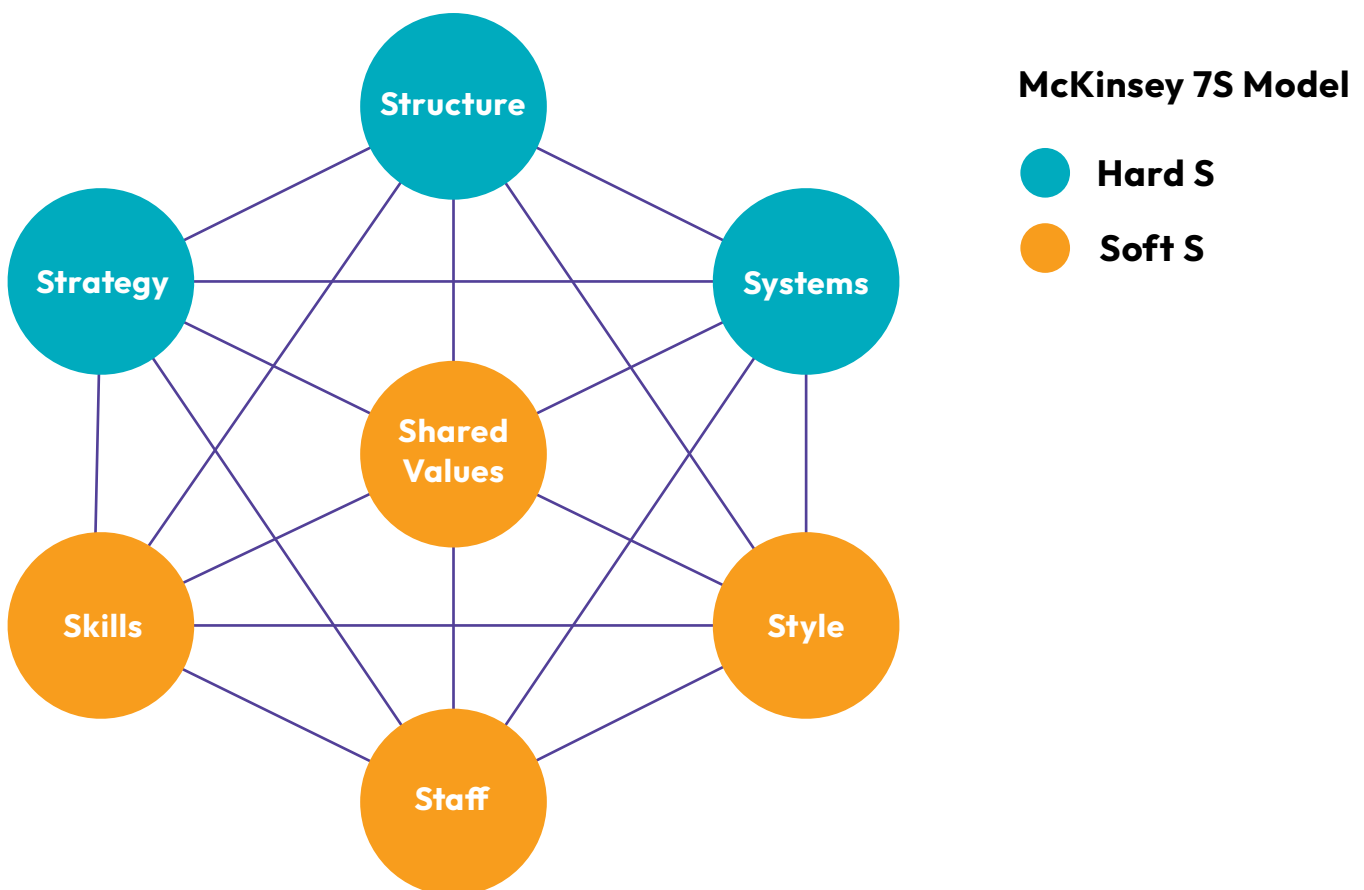
Senior Living Scenario.

In our hypothetical case of ABC Assisted Living where a new Executive Director (ED) has been charged with improving the reputation and high employee turnover of the struggling community, the new ED will often employ the skill of prioritization. A leader's ability to discern and communicate the most impactful work or needed outcome to the team can be a catalyst for growing confidence and continued efforts.

Inspire Others

Leaders who inspire others help team members go from "have to" to "want to." Inspiring others will give team members the autonomy to make decisions on their own as well as take ownership of their actions.

In the Forbes article 10 Ways to Inspire Your Team, author Glenn Llopis wrote about ways to inspire a team. For example, he talks about Purpose, Not Just Profit. Llopis states that when you are focused on purpose, employees are inspired because they know that their work is making a difference outside of the profitability of the organization[6]. See the rest of the list here.

- Solving not just selling
- Purpose not just profit
- Know the ingredients, not just the recipe
- Learning not just lecturing
- Innovation not just ideation

- Significance not just success
- Ownership not just accountability
- Respect not just revognition
- Personal growth not just responsibility
- Trust not just transparency

> **If your actions inspire others to dream more, learn more, do more and become more, YOU ARE A LEADER.**
>
> —John Quincy Adams

[6]Llopis, Glenn. "10 Ways to Inspire Your Team." Forbes. 6 May 2013.
https://www.forbes.com/sites/glennllopis/2013/05/06/10-things
-inspire-teams-to-optimally-perform/?sh=45f287266c83

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Senior Living Scenario.

The ED of ABC Assisted Living may frequently be called upon to inspire the team toward collaborative action. For example, the ED may need to influence a weary team to reinvest in an area in which it has previously struggled such as hiring new team members.

Guide Change

Creating successful and sustainable change is one of the biggest barriers that any organization will ever face. With the increasing complexity of a fast-changing business world and the rising impact of new technologies, a leader's strategic imperative to change is clear: Without a continued desire to grow, improve, and find better solutions, organizationally a leader, company or industry will either stagnate or fail.

At its core, change leadership (guiding change) is about collaborating to create a shared understanding of the change needed to get us to our desired results, and how to best make that happen. Still, change-management research has continually demonstrated that organizational change initiatives fail more often than they succeed, despite significant resources being committed to help create it.

[Kotter's 8 Steps to Leading Change](#) provides an approach for producing lasting change. Born from a desire to identify common success factors, Kotter observed leaders and organizations and then documented them as the 8 Steps for Leading Change. The eight steps include:[7]

- Create Urgency
- Put a Team Together
- Develop Vision and Strategies
- Communicate the Change Vision

- Remove Obstacles
- Set Short-Term Goals
- Keep the Momentum
- Make Change Stick

THE BIG *opportunity*

- CREATE A SENSE OF URGENCY
- BUILD A GUIDING COALITION
- FORM A STRATEGIC VISION
- ENLIST A VOLUNTEER ARMY
- ENABLE ACTION BY REMOVING BARRIERS
- GENERATE SHORT-TERM WINS
- SUSTAIN ACCELERATION
- INSTITUTE CHANGE

Returning to our example of ABC Assisted Living, the newfound ED must lead the initial change effort and continuously reinvigorate and motivate the team to sustain its change initiatives. Now that the team has enjoyed success in hiring new team members, the ED must ensure that the change sticks. This may come in the form of institutionalizing the new applicant tracking system they used to achieve their earlier success.
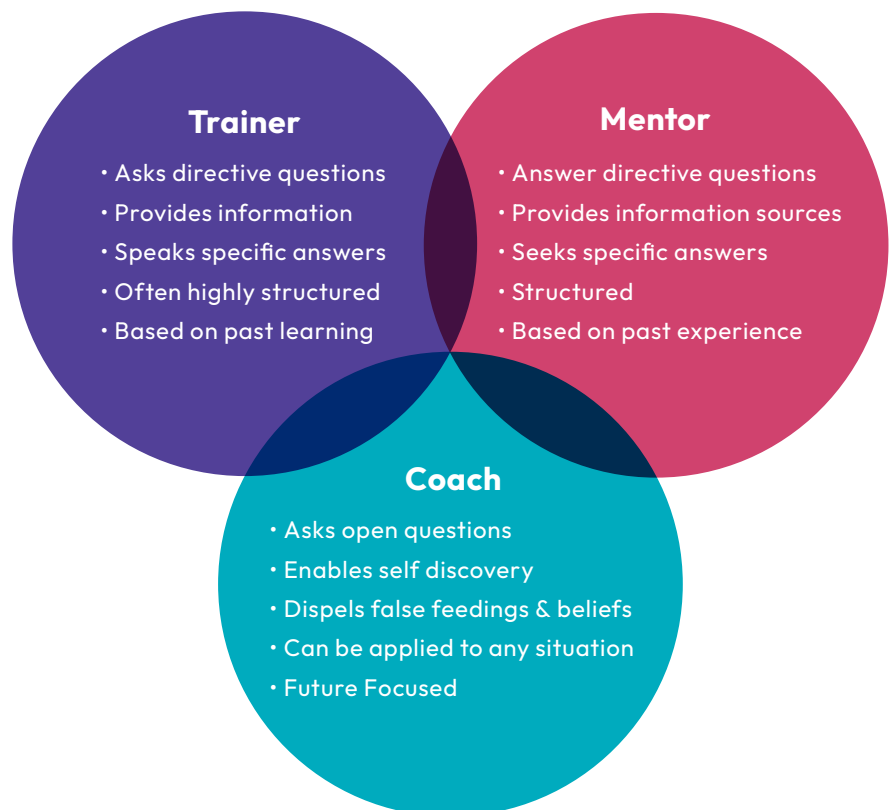
Develop Employees

Strong leaders provide coaching or mentoring to each employee based on individualized needs and goals. Developing individuals looks different for every team member as each individual will have different goals, needs, and areas of focus.

Dr. Jim Collins, who wrote about the Three Employee Development Models[8], speaks to three key areas for development and how each development models works to develop employees:

▼ Mentoring
▼ Coaching
▼ Cross-Training

Mentoring and Cross-Training match up "less experienced employees with a highly-qualified and experienced" team member while "coaching matches up experienced managers or highly skilled employees with less experienced employees who need to learn new skills."

Trainer
• Asks directive questions
• Provides information
• Speaks specific answers
• Often highly structured
• Based on past learning

Mentor
• Answer directive questions
• Provides information sources
• Seeks specific answers
• Structured
• Based on past experience

Coach
• Asks open questions
• Enables self discovery
• Dispels false feedings & beliefs
• Can be applied to any situation
• Future Focused

(Wood, 2017)

[8]Dr. Collins, Jim. "Three Employee Development Models." 27 Nov. 2019. Collins. https://www.drjimcollins.com/three-employee-development-models/

Our ED in the hypothetical case has identified that a key influencer on the team is the Health and Wellness Director (HWD), a longstanding member of the team who is well respected. In many ways, however, this HWD has stalled her own professional growth. Taking a highly individualized approach, the ED has determined that he will adopt a mentoring relationship with the HWD to facilitate personalized introspection and career planning.

Lead Teams

Leaders who elevate have a keen sense for helping teams engage and collaborate to achieve a common goal. More than just team building, development and management, this leadership skill includes creating a sense of pride or ownership, providing support and guidance when needed, and establishing team norms or expectations.

This Forbes article[9] lists five steps to lead teams more effectively:

1. **Create an environment of leadership at all levels.** This empowers all team members to "take charge in the absence of orders"
2. **Make the team feel safe.** Team members will fight to protect their teams when senior leaders stay calm under pressure, communicate effectively, provide resources and remove obstacles
3. **Actively manage through adaptive change.** Leaders must communicate consistently, ensure understanding, share leadership roles and get feedback
4. **Be a servant leader.** Asking nothing of the team that the leaders would not perform themselves
5. **Always eat last.** A clear military reference, the point is to sacrifice for the team the way they might sacrifice for the leader

[9]Gleeson, Brent."5 Ways to Lead Your Team More Effectively." Forbes. 18 Feb. 2015.
https://www.drjimcollins.com/three-employee-development-models/

Senior Living Scenario

ABC Assisted Living has seen early success in the new ED's leadership and impact to team morale and to staffing problems. Along with a reinvigorated HWD, the ED directs much of the effort to leading the team to continue a collaborative approach to retaining new hires. This ED takes the approach of continuously reinforcing the positive impact that specific new team members have had on the team, which in turn, influences the other managers to keep sharing kudos and encouragement to those team members using specific examples. The flywheel effect of this sustained change effort continues to build.

Manage Stakeholders

Stakeholder management is about identifying, managing and ultimately improving relationships to achieve shared results. The CIO Magazine article Stakeholder Management: Your Plan for Influencing Project Outcomes[10] lists these steps for managing stakeholders flawlessly.

1. Conduct and document an analysis of key stakeholders
2. Identify and document each stakeholder's role and impact
3. Prioritize stakeholders based on influence and interest
4. Develop a comprehensive communications plan that identifies frequency and type

Identify   Analyse   Plan   Engage

Senior Living Scenario

In addition to having identified a key influencer on the management team, the ED also identified several residents and their family members who have been very vocal about staffing turnover. The ED scheduled one-on-one meetings with each of these resident and family stakeholders to learn about their concerns, hear ideas, and listen about how staffing struggles have impacted them. Additionally, the ED reported progress to this unofficial committee every two weeks during the community's early push. The positive changes are starting to expand to the greater community and market as evidenced by an uptick in applicants citing "word of mouth" as their inquiry source.

[10]Alexander, Moira. "Stakeholder management: Your plan for influencing project outcomes." CIO. 6 Mar. 2020. https://www.drjimcollins.com/three-employee-development-models/

Blending Love and Discipline

Leadership, in fact, is the way through and to the other side of the common challenges our industry faces. First, we must acknowledge and define key improvement areas. Simply, leaders must be equipped with a framework from which to assess, improve, and execute on their leadership responsibilities.

The charge is not to care (love) less. The challenge is to integrate our inherent, high capacity for love with the necessary, balancing competencies of discipline. Highly effective leaders elevate others through their own mastery of managerial effectiveness, inspiring others, guiding change, developing employees, leading teams and managing stakeholders.

The gift of the leader who elevates is an ability to raise the team's vantage and peek out past the challenges that have slowed its progress. Adept at both Love and Discipline, these leaders will move our industry forward from "have to" to "want to."