

The future is an employee-first workplace

Adopt the employee-first culture to better serve each resident in senior living.

International Council on Active Aging

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About the ICAA Forum

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The ICAA Forum brings together thought leaders from many organizations—both private and public—to form a think tank that develops strategies to turn the challenges facing senior living providers into opportunities. Launched in 2005, the meetings forge connections among industry leaders while promoting understanding and cohesive action around the ultimate goal: health and quality of life as people age.

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About International Council on Active Aging®

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The International Council on Active Aging has led, connected and defined the active-aging industry since 2001. Founded in the belief that unifying the efforts of organizations focused on the health and well-being of older adults benefits both the people they reach and the organizations themselves, ICAA's vision is shared by over 10,000 organizations. ICAA's support of the active-aging industry includes industry research reports, program development, market development, education and research on healthy aging and wellness, strategy development, public relations campaigns and recognition programs.

ICAA Education, Inc., a sister company, develops and delivers courses to help active-aging professionals build needed skills and knowledge to impact older-adult wellness and the business bottom line.

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EXECUTIVE SUMMARY

Shift to an employee-first culture

The senior living industry, like many other industries, is facing an acute staffing shortage that challenges the ability to deliver services. Senior living operations are complex businesses, ranging from hospitality to nursing care, which means employees are vital to the residents and customers being served. Senior living is a people business.

Even before the pandemic, appropriately staffing the numerous positions in senior living was problematic, as was retaining workers. Recognizing that addressing the staffing challenge requires big, bold ideas, the International Council on Active Aging (ICAA) hosted an ICAA Forum think tank in December 2021.

Over two days, senior living thought leaders identified issues, shared best practices and arrived at the boldest idea: Focus first on the employee, second on the resident and customer.

The philosophy of focusing first on staff members instead of residents is a new approach for senior living. Yet the employee-first (or people-centric, people-centered workplace) concept is simply transferring person-centered care out of the hospital and into the daily lives of people in the workforce.

Many organizations have adopted the employee-first culture, recognizing that engaged, satisfied employees take great care of their customers. (As an example, this is the formula used in the hospitality industry.)

In a person-centered workplace, each person is respected and valued for their abilities, their needs are met, and their input acted upon. Colleagues at the ICAA Forum emphasized that frontline staff members—those who have regular in-person contact with residents, family members and customers—deserve to work in a person-centered, employee-first workplace because they deliver what the organization promises.

Employee-first philosophy and action items

As Forum colleagues thought about the employee-first concept, their own shift in mindset began to take place. The philosophy and action items to move senior living to an employee-first culture emerged during the ICAA Forum.

1. Make employee wellness a fundamental value.
2. Empower local leaders and staff members.
3. Build a culture of trust with authentic communication and actions.
4. Shift the human resources function from transactional to transformational.
5. Update the recruitment philosophy and tactics.
6. Prioritize training, career paths and professional development.
7. Prioritize professional development of executives and managers.
8. Utilize technology to support staff.
9. Update the revenue model.

Building a new role for the workforce in senior living, as in all organizations, means changing the mindset of every leader and every worker.

Senior living organizations have a track record of rapidly responding to the pandemic by changing the physical layouts and public interactions, and the way food service, lifestyle, fitness and nursing assistance are provided. Understandably, every staff member and leader in senior living is feeling the fatigue of constant change and stress. The operational changes over the past years were reacting to the pandemic. The rules of business-as-usual failed, and new rules need to be created. Isn't it time for proactive change?

The senior living industry is fortunate to have an incredible asset: talented, dedicated staff members who know what can be done to best enhance the quality of life of residents. When employees, managers and executives work together as equal partners in the success of the organization, each resident, family member, customer and supplier benefits. A person-centered, employee-first culture guides the future of the senior living model.

About the language in this report

The dictionary defines the word “staff” as a group of people, and the word “workforce” means every person available to work. This usage suggests that “staff” is a single entity and a commodity.

In this report, “staff member” and “worker” are used to recognize the individuals who comprise a team of staff members or a workforce.

The term “employee” is used to refer to everyone who works at the organization, whether they are legally categorized as an employee or contractor, temporary or part-time and paid an hourly wage or a salary. In this report, “employee” includes executives, managers at all levels and individual staff members.

A “frontline” worker has face-to-face contact with residents, their families, colleagues and suppliers. This may mean people working in reception, dining, wellness, housekeeping, activities, caregiving or management.



SHIFT THE PARADIGM TO AN EMPLOYEE-FIRST WORKPLACE

“We are moving toward person-centered solutions for our customer, our residents, so wouldn't it make sense to focus more on person-centered solutions for our staff?”

Colin Milner, CEO, International Council on Active Aging

Residents benefit in the person-centered workplace

As the pandemic progresses, many people are rethinking what they want from their lives and their work. Constraints such as family care, housing, illness, incomes and frustration are influencing people to stay in their current jobs or choose another one. The people who stayed in the senior living workforce faced all these challenges despite constant stress, heavy workloads and wrung-out emotions.

Few outside the senior living industry recognize the complexities senior living providers face as they manage multifaceted business combinations of real estate, restaurants, lifestyle and care for older adults. The colleagues who joined together at the International Council on Active Aging (ICAA) Forum December 2021 remain acutely aware of the difficulties their organizations are juggling to keep residents and workers safe while providing the promised services.

The challenge of recruiting and retaining a high-performing workforce for senior living is not new. Nor did staffing challenges emerge because of the pandemic—the pandemic-related pressures only intensified the issue. It was evident that Forum colleagues have given thought to the staffing issues in senior living long before the pandemic. In particular, there was a lot of input on frontline workers, the people who have regular in-person contact with residents and their family members. And, there is pent-up demand for standard practices to change.

The questions circulating during the ICAA Forum discussion focused on what needs to happen to build on the industry's greatest asset: the people who work there. How can the philosophies and policies in senior living organizations enhance the employee value proposition—the combination of

compensation and benefits that are exchanged in return for the person's quality work? What will encourage a person to work with an organization providing services for older adults? What needs to change to aid the recruiting, hiring and retention of employees in all roles?

There is a philosophy that could stabilize the senior living workplace: Focus on staff members first, and they will take care of the residents and customers.

The bold idea: Apply the person-centered philosophy to each worker

“Clients don't come first. Employees come first. If you take care of your employees, they will take care of your clients.”

Sir Richard Branson, Founder,
Virgin Group

The number-one focus in senior living is typically the resident. Staff members are constantly reminded that the residents' needs are the top priority. In assisted living and nursing environments, the “person-centered care” philosophy focuses on the resident by incorporating an individual's preferences, goals and abilities into care decisions.

What would happen if the concepts of person-centeredness are extended to each person working at the community? What if we acknowledge that the employee is the critical link between the resident and the organization's purpose? By first taking care of each staff member, gains in productivity, job satisfaction and retention would in turn benefit the residents.

The culture that engages staff members first is called employee-first and people-first, person-centered and person-centric. Advisory firm Gartner

recommends that employers see “people” instead of “workers” in the pandemic environment and craft the employee value proposition with person-centric approaches rather than features.¹

In long-term care, an employee-centered culture can help reduce turnover and improve care.^{2,3,4} From the business point of view, organizations that prioritize the people who work there have higher profits and growth.^{5,6}

The employee-first philosophy is a centerpiece of organizations such as Southwest Airlines, Starbucks and Darden Restaurants, each with a cadre of frontline workers, because happy employees provide excellent service, which leads to more customers, growth and profitability.

The concept of a person-centered, employee-first workplace is not new, but focusing on the staff member before the resident or customer is a paradigm shift for many senior living organizations.

In an employee-first workplace, staff members are equal partners with the employer in realizing the organization’s mission. Parallel to the concept of person-centered care, the needs, abilities and goals of each worker are discovered and respected, and the workplace makes adjustments to accommodate them. The well-being of employees is paramount, whether in the design of physical spaces or daily interactions. The dimensions of wellness frame the employees’ experience to aid their physical, mental and emotional health.

Each person is valued as a contributor and partner in the organization’s success. Open communication, trust and managers who model the employee-first culture are hallmarks.⁷ As a result, an employee-first culture creates an environment where people want to work.

An employee-first culture:

- Recognizes staff members are the biggest company asset
- Encourages and appreciates employees in all roles
- Acts upon employee suggestions
- Measures employee behaviors against the organization’s values
- Prioritizes people over profits, but gains in productivity lead to growth and profit
- Makes managers accountable to employees

The employee-first approach does not mean residents are secondary; because staff members’ needs are taken care of, they focus on residents and customers.

Changing the role of the workforce in senior living, as in all organizations, means changing the mindset of every leader and every worker. Strategies that set the direction will guide the future.

Develop the mission of an employee-first culture

- Why would a person want to work in senior living environments? What are the reasons beyond wanting to help others?
 - How do staff members contribute to the success of the organization?
 - Are staff members and the workplace included in your mission statement? Why or why not?
 - What is the person-centered Employee Value Proposition (e.g., for wellness, self-care, satisfaction)?
 - What would an employee-first culture look like?
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EMPLOYEE-FIRST PHILOSOPHIES OPTIMIZE STAFFING

“Staff members are not a commodity, they are human beings, we are human beings doing this together. It starts at the top, recognizing that the bottom supports the top. Show some compassion and grace to employees.”

Sandy Stoub, Director of Programming, Symbria

Connect values and mission to staff members

In the old style of “command and control” management, the manager told workers what to do and how to do it. In today’s workplace, managers are coaches who advise and support their team members, the ideas and autonomy of each staff member are enabled, and employers understand that each person has a life outside of work.

People in the 20+ workforce who are candidates for senior living positions are just like the people 60 years and older that senior living wants to attract: diverse in background, interests and attitudes, and looking for a lifestyle that meets their expectations. The old style of tough managers is not likely to attract and retain them.

People tend to leave a job because of lack of recognition, their immediate supervisor/manager, burnout, lack of career growth and flexibility, and noncompetitive pay.^{8,9} A survey found that 31% of US employees in healthcare/social assistance roles who were “struggling or suffering” in their lives during and outside of work left their jobs between March and October 2021.¹⁰

Another survey from McKinsey revealed that 42% of healthcare and social-assistance workers left their jobs without having another one, which suggests the current workplace did not accommodate their personal needs. Among all respondents to this survey, people who resigned felt the organization (54%) or their manager (52%) did not value them and half (51%) did not feel they belong at the workplace.¹¹

Do managers even know what is triggering a resignation? Or do they assume knowledge without diving into the real reasons why? It may seem too hard to change management styles given the number of regulations and protocols that senior living organizations must follow. Yet, given that the labor shortage is the largest challenge organizations are facing, isn’t it time to try something new?

Throughout the Forum discussions, colleagues reiterated that frontline workers—those with person-to-person contact in food service, caregiving, wellness and other roles—were not given the resources and respect they deserved.

Frame the elements of an employee-first culture

- How important are the values that guide your culture? Are the values practiced daily, or are they spoken but not acted upon?
 - How much is invested in each staff member’s success?
 - Is the Employee Value Proposition for frontline workers different from the EVP for managers and executives? Why?
 - Is employee health and wellness a value? How successfully is it being implemented?
 - Are the benefits offered being taken advantage of?
 - How much attention is given to employee’s financial wellness?
 - How are managers held accountable for employee well-being?
-

1. Make employee wellness a fundamental value.

“One thing we learned is we cannot survive without frontline workers, they are critical. Without them we are nothing. They are strong, they are fearless, and we owe them the debt of gratitude they deserve.”

Kelly Ording,
Regional Director Resident Programming, Watermark Retirement Communities

The emotional strain people feel as the pandemic evolves has been magnified in senior living. The work is driven by relationships between residents



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and staff member, and workers often form close connections with residents and family members. Meals have to be prepared and delivered, care provided to those requiring assistance, and engagement opportunities redefined to keep up spirits. Maintaining the health—physical and mental—of residents underpins all the actions of each staff member.

Seven days a week and 24 hours a day, staff members are the engine that keeps the real estate and services running, so it is no surprise that workers are experiencing high levels of stress, burnout and frustration. In an employee-first workplace, the mental health and physical health of each staff member is prioritized, because a mentally and physically healthy employee can best support the mental and physical health of each resident.

Research from the Bersin Company finds that a culture of employee well-being, including a safe workplace, physical health, mental well-being and financial fitness, leads to a healthy organization with

better employee engagement and retention, lower rates of absenteeism and a likelihood to “delight” customers.⁶ Those are impacts senior living could really benefit from.

An individual’s sense of well-being is based in their home life, financial life and responsibilities outside of work as well as the experience while on the job. In a person-centered workplace, attention is paid to all areas of a person’s life. While a manager cannot control what happens outside of work, she or he can provide resources that help a person lead a well life.

Employee wellness is a culture that is integrated across all operations. Wellness is not a “program” with elements that go unused, or an outside website that requires a person to make the effort to access it and maybe read about high blood pressure. If there has been a limited return on investment, maybe the wrong things are being offered. How abundant are opportunities for emotional support within the wellness philosophy? Or a place where staff members can retreat for a break?

EMPLOYEE-FIRST PHILOSOPHIES OPTIMIZE STAFFING

Reposition resources already available at the community.

- A chaplain can serve as a nonjudgmental listener and sounding board for staff members, and provide suggestions and hope, as provided for residents.
- Fitness leaders could become coaches to help individual staff members prevent/recover from injury or illness. Physical activity benefits mental health.
- Peer mentors can advise on best approaches to a situation while providing encouragement.
- Remodel the break room into a comfortable, useful space. Move it to a larger room, with windows, and new furniture. Replace the small room with cast-off furniture and poor ventilation, which signals a lack of respect and appreciation.

Integrate wellness opportunities into work schedules.

- Reduce levels of burnout by integrating employee wellness opportunities into the workday.¹² For example, if a person needs to take 10 minutes to go outside and breathe or walk, allow it.
- Adjust schedules so hourly workers have the same flexibility enjoyed by salaried staff members to take a walk or visit for emotional health support.
- Identify team members who can fill in a role to allow staff members to take a wellness break.
- Schedule 10-15 minute exercise and stretch breaks into each day for stress relief and injury prevention. One community schedules a session, such as seated yoga or meditation, 30 minutes before and after shift change. Employees can stay after they clock out or come 30 minutes early before they clock in.

Workplace wellness is more than allowing employees access to the fitness center during restricted hours or brown bag lunches that won't be attended because of 30-minute lunch breaks. The wellness philosophy,

framed by the dimensions of wellness, influences all of an individual's life during and after work hours.

2. Empower local leaders and staff members.

Senior living organizations with more than one property, or a property with many types of living options, establishes its brand so the services and lifestyle are consistent. The larger an organization, the simpler it is to make rules and procedures that apply to every location.

But that brand is implemented locally, and "local" in a rural area of the Midwest is likely different than "local" in an urban center of Toronto or Manhattan. Unanimous input from Forum colleagues who regularly visit properties is that the culture and operational pressures differ in each separate location, and can differ among buildings on the same campus. There is a sense that people in the corporate office do not know about or understand how work gets done.

An employee-first philosophy recognizes that everyone who works for the organization, from executive directors to housekeepers, is capable and an expert on local conditions. The pandemic required individuals to make decisions and act using good sense to handle a situation. That level of initiative is valuable for the residents and the organization to thrive. Careful hiring and ongoing support mean the brand will remain intact.

Counteract negative assumptions about frontline workers.

- Engage in self-reflection about conscious and unconscious prejudices about members of the diverse workforce that includes people from different cultures and levels of education.

- Elevate diversity, equity and inclusion from a once-a-year training to a core operational imperative.
- Require executives and corporate staff to visit communities and listen to thoughts of people in all positions.

Empower staff members to participate in decision-making.

- Rethink organizational hierarchy to reduce the number of layers decisions travel through.
- Educate each staff person on the big picture of operations so they can contribute useful ideas and understand why decisions are made.
- Give corporate executives and directors the same training staff members receive on encouraging a person with dementia or working on the kitchen prep line so their decisions support operations.

During the pandemic, some organizations sent corporate staff to properties struggling with labor shortages. Corporate staff who had never worked outside of an office had first-hand experience of laundering resident clothes and serving food. Harness that knowledge of how difficult and tiring these jobs can be to prioritize the shift to an employee-first philosophy in frontline environments.

3. Build a culture of trust with authentic communication and actions.

“Build a spirit of trust so everyone knows they can come in and offer a suggestion and they won’t be judged. Not every idea will be viable, but allowing staff to implement some of their suggestions helps create the trust they can solve problems and not just bring them to the door and leave them there.”

Anjuree Moore,

Director of Human Resources, Presbyterian Villages of Michigan

Trust in managers and fellow workers—and by extension the organization—is the belief that they are reliable and honest, and will do what they say. Does the company values statement say workers are trusted to do the right thing? Or is the organization so risk averse it prevents them from trying something new or different?

Authenticity essentially means to believe what you say and do what you say. Lofty phrases lose meaning if they do not guide everyday interactions, job descriptions and reward systems. If there is a mismatch between what the organization promotes and what the workplace is like, staff members will look at each mention of “values” with skepticism.

For example, when people in the workforce fear their ideas are not wanted or will result in retribution, there is an unwillingness to suggest changes that would improve workflow and processes. Or if a manager says something will happen, then it does not, trust is eroded. You can only tell people they are valued so often if actions do not support those words.

Regularly communicate an accurate “state of the organization.”

- Recognize that people who know the truth about the status of the organization are best prepared to meet current needs.
- Sharing information about goals and plans shows workers they are trusted team members.
- Inform all workers of the actions being taken to maintain or improve the organization.

Reinforce a culture of positive communication.

- Prepare managers and supervisors for coaching conversations with team members to solve problems or support career growth.
- Schedule regular team meet-ups for exchanges of ideas, experiences and mutual support.
- Accept staff member input, negative as well as positive.

Embedded in “how” the organization’s mission is delivered is the staff member. The employee-first culture recognizes that trust and authenticity create a productive and engaged workforce.

ACTIVATE EMPLOYEE-FIRST STRATEGIES

“We have spent the last two years calling people heroes, but what has really changed? We should generate new models where people want to come to work knowing they will be paid well, grown well, and seen as vital parts of the world.”

Sean Kelly, *President and CEO, The Kendal Corporation*

Turn philosophy into actions

An organization’s culture is not the sole responsibility of human resources staff members, it is a responsibility shared by every executive, manager and worker. Employee-first strategies can become part of the organization’s annual plan, but it is the people who will implement them and “live” the culture.

Remarkable, rapid changes took place in senior living over the past years; some changes will remain in place (smaller groups, better ventilation) and others will continue to evolve. Right now some organizations are contemplating how to restructure and adjust for the future.

At the ICAA Forum, there was a loud call to see staff members as people who deliver the mission instead of an expense item, an attitude echoing input made at earlier ICAA Forum meetings. A shift to an employee-first culture may be new to senior living, but it is within reach.

Plan the shift to an employee-first culture

- What is the essential work that needs to be accomplished?
 - How can we shift to a long-term focus on careers vs. short-term focus on turnover?
 - How do we define the stages of a staff person’s career in senior living?
 - How will employee-first philosophies guide operations?
 - How will employee-first philosophies direct leadership training and development?
 - What is the balance between people and technology?
-

4. Shift the human resources function from transactional to transformational.

“Many times the relationship between staff and residents is what keeps people with us. People definitely feel appreciated by the residents, but not always by upper management and that risks losing good people. We can’t create an environment where people are reluctant to do their best or go above and beyond for residents because there is no recognition, or in some cases, old policies that cause disciplinary action.”

Stacey Judge,
Community Wellness Program Director, Springpoint Senior Living

A personality that enforces rules is not necessarily the same as one that creates positive interpersonal relations with staff. Consider there are two functions in human resources: one guides the culture and supports each staff member, and the other takes care of paperwork. To create an employee-first workplace, human resources staff members need to be freed to be creative and flexible.

The human resources (HR) team has many responsibilities, including compliance. An employee-first organization unites HR, organizational development, training and development into a single force nurturing an employee-first workplace. The employer-employee relationship has been upended, and the people in today’s workforce are looking for meaningful jobs, respectful treatment of each worker and opportunities for advancement. In the workplace, people want to feel they belong, are involved in decision-making and have the opportunity to be creative.¹³ Most people in the human resources field know this, and they need the leadership in the organization to understand it, too.

A recent survey found that nearly half of employees who are not knowledge workers—for example, lifestyle/fitness, dining, caregiving and housekeeping type roles—desired a workplace that allows them more flexibility and control over when they work and how much they work.¹⁴

Policies to minimize risk and follow regulations may seem to leave little room for flexibility. Yet, flexibility can adhere to the rule while supporting staff. For example, if a good worker is 10 minutes late because of ongoing childcare timing conflicts, wouldn't it be better to let that person start one hour later?

Position human resources as a creative solution provider.

- Write a HR department mission that emphasizes an employee-first workplace.
- Reframe the role of human resources as a business partner supporting people more than rules.
- Empower HR to concentrate on positive employee-worker relationships.
- Develop coaching skills among HR staff.
- Budget regularly for “soft skills” training for executives, managers and staff members.

Update benefits packages and compensation.

- Structure employee benefits a la carte so staff members can choose the benefits that are valuable to them (parallel to how services could be provided to middle-income residents).¹⁵ Employees may not have the money to contribute to a retirement savings plan or time to access the fitness center. Perhaps childcare is more important to one person and tuition reimbursement to another.
- Provide all staff with the same perks and benefits that are available to executives and senior managers.

- Investigate making staff in all roles (not only senior leadership) shareholders through employee stock option plans or profit sharing to encourage engagement and loyalty.
- Explain the dollar value of benefits so workers see how the health insurance, paid time off or other benefits are part of their compensation.
- Reevaluate pay scales. For example, adjust pay by taking into account experience or incentivizing workers who take advantage of professional development programs to increase their skill set.

Provide technologies that support HR tasks.

- Seek systems that enable flexible, personalized schedules and benefits.
- Compare systems that automate paperwork processes.
- Develop online/digital virtual interview system.
- Record and save interviews and notes in a system managers can access.
- Emphasize use of business and HR-specific apps and software for tracking applicants, measuring success of social media and internal posting of job openings, and confidentially sending/receiving paperwork.

5. Update the recruitment philosophy and tactics.

Senior living communities are competing for workers against warehouses, restaurants, retail, hotels and similar occupations. Yet senior living communities have characteristics with appeal for potential candidates: meaningful work, a variety of work schedules, and opportunities for professional growth.

Forum colleagues agreed that workers tend to move among senior living communities and care facilities, and the industry does not attract many new people

ACTIVATE EMPLOYEE-FIRST STRATEGIES

outside of the industry. An employee-first organization has the ability to bring in people from outside the industry, and younger workers who can grow within the organization.

The journey from candidate to employee begins with a solid value proposition that describes the culture and reasons why a person should work in senior living.

Adopt marketing tactics to stimulate recruitment efforts.

- Form a partnership with marketing to compose wording that describes the positive, interpersonal rewards of working in senior living.
- Adopt marketing language to emphasize the potential for careers. (Make sure there is opportunity to travel along a career path).
- Produce short videos of staff members who moved into different roles or acquired an education during their employment. For example, a person who started as a server and was promoted or earned a degree through the organization's career development program.
- Share video clips of staff members and volunteers interacting with one another and residents to show what it's really like at work.
- Use nontraditional social media extensively and go to popular sites like TikTok and Instagram where a very short video can showcase the people in the work environment.

Rethink job descriptions and scheduling.

- Include the soft skills that are needed in job descriptions, which can reflect a more accurate view of the job and imply how the mission is delivered.
- Consider emotional intelligence as a hiring criterion.
- Create part-time positions to give flexibility in work schedules for better work/life balance.

Acquire the technology that enables less structured work schedules.

- Build a bench of trained “gig” workers who can fill in needed positions on a schedule. (Volunteer management software may help with scheduling.)
- Adjust shift start times to meet the needs of the worker, which may mean, for example, after schools are in session.
- Attract restaurant workers by posting shift schedules showing no late nights are needed. Short shifts around dinner times can appeal to high school and college students.
- Account for the location and schedules of public transportation.

Mobilize students, friends and educators.

- Encourage residents to recruit neighbors, grandchildren or friends.
- Access students with realistic opportunities and a positive experience. Schedule students at times that recognize their need to complete schoolwork and sleep.
- Offer scholarships that students repay by working at the community. For example, a nursing student works as a nursing assistant.
- Partner with a high school or community college career training program. Provide transportation, a meal and homework help by residents.

6. Prioritize training, career paths and professional development.

Organizations that invest in employee development are two times as likely to retain their workers, according to Gallup.¹⁶ Since the senior living industry would like to attract younger workers, and retain them, a clear path and opportunities for professional development are attractive. The investment is returned to the organization when workers use up-to-date skills and perspectives with residents, their families and colleagues.

Is the training and development budget limited to compliance? Is a newly hired person placed in a small, poorly ventilated room in front of a computer module for hours, alone, so training can be checked off a list? This type of experience is likely to send the message that the new person cannot expect much training, support or interaction with the manager. Why stay? Regulatory requirements must be met, and so must additional development be offered in a positive atmosphere.

A career path meanders through lateral moves and an increase in skills for a current position, while a career ladder outlines steps to promotion. Growth in a career can mean becoming a mentor, or undertaking education for a certificate or a degree as well as earning a promotion. How can each individual's strengths be utilized?

Upskilling and reskilling associates is a top priority for talent and development professionals, who note that skills become obsolete quickly. Investing in people, including frontline workers, can reduce turnover, and position people for internal projects and careers. All of these outcomes benefit the organization and the individual.

Provide mental health support.

- Convince executives and managers of the need to provide emotional and mental health resources for workers to help them deal with the challenges they face every day.
- Recruit social workers or clergy to be available at regular hours for all staff members.
- Insist that staff members, including those on the front line, be given time during the workday to meet with mental health counselors.
- Partner with local mental health organizations to provide counselors and programs.

Encourage participation in development programs.

- Schedule training and development sessions during company time.
- Provide training through mobile devices since not all workers have internet access and computers.
- Develop training that employees request.
- Base development programs on person-to-person interactions (e.g., in-person sessions, role play, scenarios).
- Add small, 5-minute learning items to daily or weekly staff meetings.

Good practices

RECRUIT We're conducting a deep dive into what our job descriptions say as opposed to what people actually do to show the fun and human side of the job. Regardless of job title, adding the warm side of working in senior living, like opportunities for resident engagement or associate wellness and spirit events—all the things that don't come across in job descriptions.

—*Libbi Hash, National Director of Wellness and Memory, Kisco Senior Living*

DEVELOP We stepped away from traditional performance management. Instead, a Gifts and Growth conversation asks 'what gives you joy coming to work,' instead of 'did you show up on time every day.' Managers may say, 'it sounds like you really love doing resident nails or hair outside your job description, what can I do to give you the time?' A conversation that looks forward rather than looking back. Caregiving is really hard work, and people have to find the joyful things in the work.

—*Kelly Denning, Director of Human Resources, Christian Living Communities*

ASK During a meeting a customer service person who has been with us for 10 years didn't say anything. At the end he was asked for an idea. He had a simple idea, but over one year it saved 200 person hours. It was the first time anyone had asked him.

—*Ruben Mejia, EVP Americas, SportsArt America*

TEAMWORK Give employees scheduled touchpoints with peers to really talk about what they are feeling. Make the sessions productive, so not just talking about how overwhelmed everyone is, but more to come together to brainstorm how to work with a client or how to organize schedules to help a coworker. It provides an opportunity for productive communication.

—*Neely Sullivan, National Director of Wellness & Education Specialist, Select Rehabilitation*

ACTIVATE EMPLOYEE-FIRST STRATEGIES

- Encourage staff members to ask questions and receive advice.
- Raise pay when development goals are met, such as achieving a certificate or completing a project outside a job description.

Refine the onboarding process.

- Check in with new hires at specified points over the months to help them adjust.
- Schedule learning time to educate on what a role entails, such as interacting with people with dementia, or caring for those with low vision.
- Discover the way a person prefers to learn and share with the manager.
- Relate what a staff member needs to do to take advantage of professional development and career options.

Develop skills in interpersonal communication.

- Use assessments of personality and communication styles to aid team members' understanding of one another.
- Identify areas with high turnover and evaluate if the manager's communication style is creating negative impacts.

7. Prioritize professional development of executives and managers.

For the mission and values to guide an organization's culture, every executive, manager and supervisor must understand and believe in them and operate according to that mission and those values. People at all levels in senior living benefit from professional development and coaching.

Managers are key to implementing an employee-first culture. Almost three-quarters (70%) of the difference between employees who are engaged in

their work and those who are not is due to the manager or team leader.⁹ If managers are held accountable for the employee experience, then they need to be given the tools to do so. Developing leadership and coaching skills for executives and managers is an investment that aids the person and aids the staff members who are guided by their actions.

Are new managers promoted, but then left to figure out the job on their own? Is there an assumption that a person who is a skilled worker will magically become an excellent manager even though the duties are different and the relationship with coworkers fundamentally changes? As the pandemic progressed and the urgency to fill jobs increased, only 48% of new managers reported receiving training in leadership skills.¹⁷ How well is the organization served when managers struggle in their roles?

The major reason why training and development initiatives do not transfer to work is the attitude of executives and managers who do not allow staff members to try new approaches or are unwilling to adjust current workflows. Yet new approaches and changes to workflows and processes can occur, and quickly, as everyone learned in 2020 when the pandemic hit.

The philosophies of an employee-first culture apply to leadership as well.

Teach principles of a coaching style.

- Give managers and executives permission to practice empathy.
- Integrate emotional intelligence into hiring and training practices.
- Role play listening skills and making suggestions on solving issues.



- Explain importance of recognition, including for everyday actions.
- Provide timely and focused feedback regularly.
- Practice receiving employee feedback, both negative and positive.

Provide tools to keep communication lines open.

- Establish short pulse surveys to check in on employee sentiment.
- Convert to mobile communication since staff members likely have cell phones.
- Schedule executive visits to properties to meet with those on the front line, not only other executives.
- Encourage an open-door policy.
- Adjust tasks to allow time for person-to-person interactions.

8. Utilize technology to support staff.

Technology is now an expected part of daily life, both personal and professional. Older adults have it, staff members use it and the leadership in organizations puzzle over how technology could ease the labor shortage. Cui bono? (Who benefits?) is a key question when technology enters senior living. Is it the resident, or the staff person? Or is technology introduced for the business side of the

organization without any regard of the impact on staff members or residents?

At the ICAA Forum, the consensus was that technology could assist staff members and residents, but it did not replace the people in the workforce. People use the technology to help lift a person out of bed, people program the in-house television system, people use the software to control supplies in the dining areas. And Forum colleagues added that technology is of no use if staff members are not trained on why to use it and how to use it. Without training time and dollars, the financial investment in technology is wasted.

Residents, staff members, outside providers, associations, bankers—many people demand information that is tracked or managed using technologies. Does the organization have a technology roadmap to guide decisions on which technologies benefit which people? How is interoperability determined (or is it)? How much investment in training is budgeted?¹⁸ On a spreadsheet, infrastructure and technology expenses are large, so it is natural to cut into training budgets or eliminate some teams from access. However, short-term actions could result in long-term loss of the value.

ACTIVATE EMPLOYEE-FIRST STRATEGIES

In the employee-first culture, the benefit to each person in the workforce is explained, employees are part of the team evaluating proposed technologies, and their suggestions for rolling out the technology and training are acted upon.

Define a technology strategy.

- Look at each potential technology on global usefulness, not the needs of a single department.
- Identify areas where current technology is insufficient or needed.
- List criteria for evaluating technology's value for both the business and the people.
- Evaluate the interoperability of systems (ability to exchange information).
- Evaluate the impact and unintended consequences of using artificial intelligence in decision-making.
- Consider financial parameters.
- Craft a technology roadmap to guide decision-making.

Budget for ongoing training and encouragement for using technologies.

- Reiterate how the technology will assist the worker.
- Identify people who can train and answer questions beyond information on a website.
- Schedule time to use the technology into the workday because inputting accurate data takes time.
- If technology is causing stress among workers, discover the cause and repair.

Convert employee communication to digital formats.

- Pair email communications with text using available tech platforms.
- Provide training modules in short digital formats for smart phones and tablets.
- Post a channel on YouTube or Instagram to share training for on-demand access.

9. Update the revenue model.

Investment in staff training and development, wages and benefits structures, and culture change costs money. One Forum colleague noted that money to finance a new staff position to relieve the workload on nurses was taken from the engagement budget, even though residents wanted the engagement more than they did the nursing. Why was this the only option? New financial models are needed to give a living wage to frontline workers and support benefits that compensate everyone in the organization.

The current models of senior living may not be sustainable if private pay and Medicare reimbursement are the only revenue sources. The future for a model that is over 50 years old seems uncertain when it is widely acknowledged that only a small demographic of wealthy individuals can afford senior living. The middle market of older adults cannot afford senior living today, and the current residents who can afford a property will not be there forever.¹⁵

The pandemic has shown, dramatically, how a drop in census from an unseen event can reduce revenue streams and increase costs. The shift in demographics and pandemic-era economics indicate that raising entry fees and monthly rates are not long-term solutions.

Several colleagues at the Forum referenced the impact on budgets from backfilling staff with agency personnel who are more expensive than the current employees. Agency-provided workers sometimes reveal their higher pay and do not know the workflow or residents, which sows discontent among current employees. New hires may have been offered signing bonuses that current staff did not receive.

Bold ideas

- Consider emotional intelligence as a hiring criterion.
- Structure employee benefits a la carte so staff members can choose the benefits that are valuable to them.
- Provide all staff members with the same perks and benefits that are available to executives and senior managers.
- Investigate making staff in all roles (not only senior leadership) shareholders through employee stock option plans or profit sharing.
- Create part-time positions to give flexibility in work schedules for better work/life balance.
- Build a bench of trained “gig” workers who can fill in needed positions when they have time.
- Adjust shift start times to meet the needs of the worker, for example, after schools are in session.
- Adjust schedules so hourly workers have the same flexibility enjoyed by salaried staff members to take a walk or visit a counselor for emotional health support.



ACTIVATE EMPLOYEE-FIRST STRATEGIES

The result is that employees who kept at their jobs over the past two years, maintained their commitment despite the stress, and took on extra workloads were treated more poorly than new hires and agency-provided staff. An occasional pizza for lunch does not seem to balance out the pay disparity. If there are dollars for agency-provided staff and new hires, revamping budget policies could reallocate those dollars to loyal staff.

The key metric for executives and the bankers or equity groups that finance the community is occupancy. Building a new revenue model means recognizing that staff members are an asset, not simply an expense, and they are more important to occupancy than fancy lighting or beautiful rugs. After all, needs of the pandemic have changed exterior and interior design, so the staff members and the atmosphere they create is even more important.

Identify ways that staff members generate revenue.

- Combine revenue from private pay for programs, special events, nonresident customers and memberships.
- Add dollar value of cost savings from in-kind partnerships and donations.
- Identify revenue from grants, donations and fundraising related to staff efforts.
- Determine if the cost savings because of employee wellness initiatives are accounted for.

Report the value of staff contributions.

- Compare the longer lengths to stay of residents who engage in staff-led wellness activities to lengths of stay of residents who do not participate, documented in the ICAA/ProMatura Wellness Benchmarks.
- Measure how staff members provide the programs that fuel social accountability requirements.
- Measure the number of referrals/conversions from current residents and family members that are made because of staff members.

Educate investors on the role of staff members.

- Encourage board members and advisors to rethink their assumptions about older adults and the business.
- Detail the evidence that employee-first cultures increase resident/customer satisfaction and revenue.
- Share statistics on the relationship between staff members and occupancy.
- Brainstorm with investors on the return their shareholders want versus long-term industry stability.
- Form a collaboration among organizations, trade groups, insurers, bankers and investors to develop new financial models.
- Emphasize the potential of models for middle-income markets, using the new business model to improve compensation and benefits for staff members.



MOVE FROM PHILOSOPHY TO IMPLEMENTATION

“Instead of focusing on the great resignation, focus on the people who have stayed. How can you incentivize people who are there so they feel valued?”

Debra Petersen, Recreation Wellbeing Consultant, Good Samaritan Society

Launch the person-centered culture

The call to improve the environment for the people who work at senior living properties is not new. At earlier ICAA Forum think tanks, colleagues repeatedly emphasized the need to increase recognition of staff members and listed tactics to achieve a worker-friendly workplace.^{19,20}

The staffing situation is so large that it doesn't seem reasonable to even think about changing direction. Creating a new era of person-centered staffing means taking time and energy away from finding bodies to fill all those empty positions. In the midst of a pandemic that never seems to end, it is much easier to nod at a culture shift and carefully place disruptive actions on a back burner (along with others that are not critical for tomorrow's workday). But, the world of senior living is changing, and attracting and retaining an engaged, stable staff is not a back-burner issue.

Health care, construction and manufacturing, retail, restaurants—all are trying to recruit new workers and retain the ones they have. Does your organization's employee value proposition offer the tangible and intangible benefits that will make a person decide to work with you?

The value for the employee and for the organization is based in an employee-first workplace.

Begin the shift to employee-first

- Is the employee value proposition finalized?
 - Are our policies aligned to support the employee-first culture?
 - What needs to change to shift resources to employee-first strategies?
 - Should CEOs be incentivized based on staff retention?
 - Is there pay equity among executive and manager positions and staff positions?
 - What team will champion the change to employee-first culture?
-

Take action to shift to the employee-first culture

Become a believer

- Accept that prioritizing employees will benefit customers, residents and their family members.
- Recognize that the employee-first workplace embeds all the dimensions of wellness, applied to the person working there.
- Imagine how the employee-first workplace will look in your organization.
- Put the rationale for the person-centered workplace on paper to focus your thoughts.

Gather allies

- Culture generates from senior leadership. Propose the concept to decision-makers in your organization. Focusing first on employees is a big shift for most senior living organizations and there will likely be pushback.

- List the evidence that an employee-first culture increases recruitment and retention, productivity, and is financially sound. Find evidence in the reference list of this report, and search the internet for “employee-first culture” or “people-centric workplace” or “person-centered workplace” for more examples.
- Form a team with human resources, technology and representatives from middle management and staff to learn how mindsets can be shifted.
- Identify the champions who will continue to build on the concept.

Build big ideas into proven practices

- Confirm the support of senior leadership.
- Plan methods for integrating concepts and development into the workday.
- Ensure the person-centered, employee-first focus is part of every policy.
- Begin a program to provide managers with the skills and tools they need.
- Prioritize what can be accomplished in the short-term, such as focusing on staff member well-being.
- Borrow the ideas in the “Good practices” sidebar.

Communicate the benefits and reasons, and keep communicating

- Relay the big picture of why a shift to the employee-first culture is being made.²¹
- Reinforce how an employee-first culture brings to life the purpose and mission of the organization.
- Explain how an employee-first culture benefits each resident.
- Explain how the culture will benefit each manager and each worker.

- Communicate all the details to avoid surprises.
- Integrate people in all roles in the communication process, not only executives.

Continue the transformation

A cultural transformation takes time, especially when people at all levels in the organization are feeling duress and already tired of constant changes to their workdays. Emphasizing the wellness of employees is a shift in itself. But other organizations have found it is key to a positive and effective workplace and business.

Like many other industries, the models of senior living are being reformed. What has worked over the past decades is not likely to be successful in the future. In times of great disruption, it is easier to fall back into old, reliable methods, and ignore the opportunities that disruption is creating. Isn't that how telephone companies responded to the introduction of cell phones? Today, more people have cell phones than they have landline phones and the companies that resisted change are no longer in the marketplace.

Shifting the paradigm to a person-centered, employee-first workplace is a strong foundation for a new model that equally serves everyone who walks in the door. The paradigm shift creates the opportunities to build on the positive aspects of senior living, marshalling enthusiastic, well-trained staff members, delivering excellent service, shifting business models, and opening the door to a new image of senior living.

DETAILS

Resources

Creating a path towards the “next normal” in senior living

Two pages of strategies to develop purpose-driven, caring, passionate staff
<https://www.icaa.cc/conferenceandevents/forums/forumreports.htm>

Framing the return on investment (ROI) in wellness staff

Staff member’s impact on satisfaction, revenue and social accountability, evaluating ROI
<https://www.icaa.cc/conferenceandevents/forums/forumreports.htm>

Future-proof your senior living community

Rethinking communities to, in part, provide onsite housing and/or affordable housing for workers
<https://www.icaa.cc/conferenceandevents/forums/forumreports.htm>

ICAA Competencies for wellness managers

Eight domains include assessment, planning, evaluation, leadership and advocacy
<https://www.icaa.cc/business/ICAA-Competencies-for-wellness-managers.htm>

ICAA/ProMatura Wellness Benchmarks

Data from life plan/CCRC and IL/AL communities
<https://www.icaa.cc/business/benchmarks.htm>

Leadership in Wellness Management certificate course

Modules on culture, communication, business planning, teamwork
<https://www.icaa.cc/certificate/leadership/reasons.htm>

Strategies for utilizing the talent of 50+ workers

Skill sets, upskilling and reskilling, action plan and HR checklist
https://www.icaa.cc/listing.php?Page=2&c=&listing_search_value=&type=white_papers



Toolbox

Colleagues at the Forum use these tools or recommended them.

Assessments for culture, personality	<p>Barrett Values Assessment https://www.valuescentre.com/tools-assessments/cva/</p> <p>CliftonStrengths (formerly StrengthsFinder) https://www.gallup.com/cliftonstrengths/en/252137/home.aspx</p> <p>DiSC profile https://www.discprofile.com/what-is-disc</p>
Recruiting, candidate tracking & interviews	<p>Caliper Employment assessments https://calipercorp.com/</p> <p>JazzHR https://www.jazzhr.com/</p>
Technology	<p>TSOLife Minerva AI platform for data collection, insights https://tsolife.com/</p> <p>CareBridge technology for long-term care https://www.carebridgehealth.com/</p> <p>Touchtown https://www.touchtown.com/</p> <p>Cubigo https://www.cubigo.com/en</p> <p>K4Connect https://www.k4connect.com/login/</p>
Digital, mobile communication	<p>Mobile Iron digital workplace https://www.mobileiron.com/en</p> <p>Textline (HIPAA compliant available) https://www.textline.com/</p> <p>Podium texting https://www.podium.com/</p> <p>RedEye AI driven Marketing Automation platform https://www.redeye.com/</p>
Training and development	<p>Vision 2025 Collaboration among education, business, senior living to develop managers https://vision2025initiative.com/</p> <p>Relias https://www.relias.com/</p>

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