SLIDE	SCRIPT: OPS Functional Breakout
01:00-01:03 minutes WHAT MATTERS TO STORY OPERIORS Brookout Winning Locally Operations Brookout WINNING LOCALLY CONTROLLY C	NOTE: Presenter says words in BOLD font. Italicized words are actions the presenter does. Presenter: Mary Sue Patchett ENTRANCE: Tap-Tap-CLAP ("We Will Rock You" clapping supported by DOC teams) Presenter: Mary Sue Patchett Welcome and opening remarks. SAY: We are BROOKDALE! Turn to the person next to you, if you don't know them introduce yourself or say hello, and share three ways YOU are Brookdale! You'll have 1 minute. Ready go! Pause for people to share.
	Shout out some of the ways you are Brookdale. We are Brookdale. We are [insert a few things you heard people say.] Thank you for your commitment to help us do what matters most.
We Are Incidiose Free + Reism - FILL ALL FORMORS Control Cont	[NOTE: THIS SLIDE HAS ANIMATIONS] Earlier today you saw this formula. The formula can serve as a guide to align our work today to our vision for tomorrow. DO: Explain the formula.
O1:03-01:08 RECAP the General Session: Write O3 Things you learned O2 Things you'll do O1 Question you have (to be used in the freede char) MICST	Supplies: You'll need a scribe, flip chart, and marker; and one index card per person. The scribe will record answers that people share. SAY: Before we get started, let's recap what you learned in the Ops General Session. Here's what I'd like you to do. On page 2 of your handout, write: 3 things you learned, 2 things you'll do, and 1 question you have. Hold up an index card. Instruct people to use the index cards for this question. If you took notes during the general session, feel free to take a look at them. You'll have about 4 minutes to answer these questions. DO: After 4 minutes, sound the attention getting device and have people turn their attention back to you. Ask 2-3 willing volunteers to share their answers to one of the three prompts. As people share, repeat back what they said and have your scribe record their answers on the flip chart. Thank people for sharing. Add any additional key information to the list that you would like highlight from the Ops General Session. Direct people to place their index cards in the center of the table. DVPs will pick them up. Once index cards are collected, place them in a basket. They will be used during the fireside chat.
01:08-01:09	Presenter: Mary Sue Patchett SAY: Let's take a look at how we'll spend our afternoon together. We're on page one of your handout. In Part 1, we'll form action steps to win locally.



Interpreting and using Tableau reports to drive performance will be our focus in Part 2.

In Part 3, we'll apply Situational Leadership strategies to increase personal and team performance.

And finally, in Part 4, we'll gather 'round for a fireside chat.

Throughout our time together, we'll stop periodically for you to record specific action steps based on what you've experienced and learned. As you form those steps, be specific and include a deadline. What gets written down gets done!

01:09-01:12



SAY: As we explore winning locally, part of our focus includes a TAD update. Turn to page 3 in your handouts.

Our ongoing Field restructure of the district teams of Ops, Sales, and Clinical continues as in the past quarter we have identified communities with Ventas and WellTower that will transition.

From May to August 1 close to another 100 communities transitioned out of our Geographic divisions either to new owners/managers outside of Brookdale or to our Transformation Asset Division bringing our average span of control down to 1:10.

In the next few months, we'll continue to scale down district teams for appropriate G&A.

01:12-01:14



Presenter: Donna Flaata

DO: Introduce yourself and your role at Brookdale.

SAY: When you think of winning locally, what comes to mind? Let's find out. At your tables, take turns completing this sentence. Winning locally is... For example, winning locally is constantly recruiting new associates. The person at your table with the birthday closest to today will go first and then continue clockwise around the table.

You have about 20 seconds each to share your answers. I'll let you know when it's time for the next person at your table to begin. Listen for this sound.

DO: Sound the attention getting device every 20 seconds and let the next person at the table know they should be begin talking. Continue this process until everyone has shared their answer.

Shout out some of your answers. "Winning locally is..."

DO: Repeat back what people say and have your scribe write their answers on a page of the flip chart.

Winning locally is all of those things, and more. Let's look at three tangible steps we can take to win locally. First, we can learn from others.

01:14-01:22

Presenter: Donna Flaata

SAY: We're on page 4 of your handouts.

Winning locally is a challenge for all of us. How do we do it? I'd like to tell you a true story. (story 3 minutes)

As you listen, write down key actions taken to win locally.

DO: After telling your story, have people get with a partner and share the



actions people took to win locally.

Allow 3 minutes for people to work with their partner.

Call time and then ask a few willing people to share their answers with the larger group. Encourage people to add to each other's answers by saying, "Yes, and" and adding onto what the previous respondent said.

Repeat back what people share and have your scribe record the answers.

SAY: Look at this list. What new ideas might you try? What items on this list affirm what you are already doing? Make note of them. Share this information with the person next to you.

01:22-01:33



Presenter: Josh Rivera

DO: Introduce yourself and your role at Brookdale.

SAY: In addition to learning from others, we can hire and retain the right talent.

Tell your story of hiring and retaining the right talent. (story 2 minutes)

ASK: What are some things our team did well to win locally? How might those actions apply to your communities?

DO: Choose a few willing volunteers to share their answers. Repeat back what

the respondents say so everyone in the room can hear.

SAY: Let's take a look at 3 things you can do to hire and retain talent.

1. Keep a list of your next hires -- The best athletic directors in college sports keep a list of the most qualified coaches they'd want to hire if they lost their current coach. The best owners of professional sports franchises keep a list of up-and-coming assistant coaches, or coaches at the college level, who have the skills to lead their professional teams. As a leader in your division, who are the people in your districts or regions who have the ability to move to the next level? Do you have a list of names you can reach for when you have an opening?

In your notes, start your list right now.

2. Identify special projects -- Are you looking for opportunities to increase the responsibilities of your high potential associates, or give them special projects to work on so they can grow their skills? Often the best way to keep someone in a job where they're D-4 -- high competence & high commitment -- is to find something new to challenge them. What are the projects that need help in your area?

In your notes, write down the projects where you need help. What names immediately come to mind as you write these?

3. Hiring Ahead – We recently started a program to "hire ahead" a pool of executive directors who can be on the bench, fully trained and ready to step into a community as soon as an opening occurs. What if our communities did the same thing for Dining Services Directors or Care Associates or whatever position you find yourself frequently filling? What if we lowered our "time to fill" from one month to less than one week? Write down the

names of some communities that could serve as a training ground for "hired ahead" associates.



Presenter: Josh Rivera

SAY: We can also on-board EDs well.

Turn to page 5.

Take a look at these statistics from CLO Media.

Companies recognized as "best-in-class" for onboarding experienced (on average):

A 100 percent improvement in the retention of new hires

A 60 percent reduction in time-to-productivity for new hires; and

A 57 percent increase in completion rates for on-boarding tasks.

Citation: © 2018 - Chief Learning Officer - CLO Media. All rights reserved.

01:33-01:36



Presenter: Josh Rivera

SAY: On boarding is key to leaders' success. Take a look at the chart on page 6 of your handout.

At Brookdale, on-boarding EDs is a 12-week program for new EDs, AEDs, and HCAs, with five components.

eLearning - 135+ courses, depending on the state; includes Associate Foundations orientation if new to Brookdale.

ED Partner - new EDs should spend two weeks in their partner's community. ED Webinars - Five webinars aligned to the Brookdale Leadership Philosophy, led by ED & Financial Learning Specialists:

- a. Mission/Servant Leadership
- b. Attract, Develop, & Grow Great Talent
- c. Using Brookdale Systems to Win Locally
- d. Understanding Your Community Metrics
- e. Making Accurate Decisions, Getting the Best Results

Financial Report Review - The division Financial Learning Specialist schedules a one-on-one session with the new ED to review their first month's financial reports.

ED Finance & Operations Workshop - a two-day event led by the ED & Financial Learning Specialists, hosted at a Brookdale community. Guest speakers include Regional HR Business Partners, Legal Trainers, and Resident & Family Engagement leadership.

01:36-01:42



Presenter: Josh Rivera

SAY: On-boarding EDs strategically benefits us significantly. It results in

- Increased REVPar
- Increased occupancy
- Increase NPS

Take a look at the list on page 7 of your handouts.

To jumpstart your ED onboarding process, do the following:

- Implement a "Red Carpet Experience" for new EDs
- Make a laptop and other resources available on first day

Schedule the new EDs first two weeks in the ED Partner's community

 Provide access to all appropriate Brookdale systems on Day One: MySpend, Tableau, etc.

Review this list and put a checkmark next to what you're already doing while onboarding new EDs and underline new ideas you'll implement in the next month.

Pause for a minute.

What other actions would you add to this list?

Take a few responses from the participants. Mention that if people hear an idea they like, they should write it down.

We know this process works. So try it! Tell the person next to you what you're going to try when you get home.

01:42-01:50

Presenter: Donna Flaata

SAY: To wrap up Part 1, let's formulate a few concrete actions steps.

What new steps will you take to win locally?

Write them down on the bottom of page 7. Then get up and find someone at another table and take turns sharing your winning actions.

Write down any new actions you want to add to your list.

DO: Allow 4 minutes for people to write and then about 3 minutes for people to share.

01:50-01:56

Presenters: Brianne Uggetti and Lori Morton

DO: Introduce yourselves and share your role at Brookdale.

[NOTE: Having people move around stimulates brain activity and helps people focus.]

Using Brookdale Systems to Drive Performance: Tableau

SAY: Let's begin Part 2: Using Brookdale Systems to Drive Performance with a fun game of Tableau True or False.

DO: Tell participants you're going to play a game of True or False. Designate one side of the room true and the other false. Draw an imaginary line between the two walls. Tell participants you'll read a statement about Tableau and they'll have to determine if it is true or false and stand near the appropriate wall. Once people are standing near either wall, they'll find one another person nearby and explain their answer. If people are unsure of their answer, they can stand in the center of the room between the two walls. After people have shared, tell the group the correct answer and explain your answer.

Tableau True/False: Choose 3-4

- Community Overview in Tableau can be used prior to community visits, focus calls and reviewing CAP plans to help identify opportunities and celebrate successes
- Your projected CMIP payment can be found on Tableau.
- You can find Occupancy by Product Type and Rate per Unit via Tableau reports.
- State Survey results in Tableau help identify clinical opportunities for a specific community.

- Service Alignment Dashboards identify associates who have accumulated overtime this month.
- Direct Debit numbers are available on the Community Overview Dashboard.
- You are able to view the last time assignment plans were updated and ran in Tableau.

Continue the same format for the other 4 questions.

Thank people for playing the game and have them return to their seats.

01:56-02:09



Presenters: Brianne Uggetti and Lori Morton

SAY: Tableau helps us win locally by identifying our areas of success and areas that need improvement our communities.

Take a look at the dashboard on the screen. It's from Brookdale Champlain.



Presenters: Brianne Uggetti and Lori Morton

SAY: Turn in your handouts to page 8 where you'll find a copy of the dashboard from Brookdale Champlain.

Review their dashboard report and circle three areas to address. For each area, list at least two actions on the CAPS form on the next page.

When you're finished, get up and find a partner. Share your work with each other.

What areas would you address and what actions would you take? Each person will have 4 minutes to talk.

DO: Sound the attention getting device at four minutes and let people know they have four minutes left. After 8 minutes, sound the attention getting device again and have people return to their seats.

Once people are seated, invite a few willing volunteers to share their answers. Be sure to repeat back what they say so everyone in the room can hear their answers and insights.

Then offer your suggestions. Begin with "You might also try..."

SAY: To help you complete your Community Action Plans, try these tips and tricks:

- 1. Utilize Community Overview in Tableau to identify opportunities.
- 2. Should be owned by the Executive Director and completely collaborative by the community team.
- 3. It is not a To Do List for the community.
- 4. Identify specific person who is responsible for the goal.
- 5. Ensure goals are set up accurately (refer to SLII)

Specific

What exactly is the goal or task and what does a good job look like? Motivating

Is the team excited and interested in this goal? Attainable

Is the goal realistic and achievable?

Relevant

Is the goal important and aligned with organization goal? Trackable

Is there a way to track progress? Are there measures?

As you wrap up, intentionally reinforce and reiterate how EVERYONE should be using the CAPS in their districts, regions, and divisions to drive "Winning Locally."

02:09-02:14

Tableau: Action Steps

Presenters: Brianne Uggetti and Lori Morton

SAY: It's time to wrap up Part 2 with more action steps.

We're on page 10 of your handouts.

- Describe the greatest insight you had about Tableau.
- How will you leverage that knowledge to drive success and win locally?

Take about 4 minutes to plan your next steps with Tableau.

02:14-02:21

Presenter: Randy Cyphers

DO: Introduce yourselves and mention your role at Brookdale.

SAY: Let's dive into Part 3: Situational Leadership II with a quick assessment. It's not scientific, but it will give us a good baseline for our work together today.

DO: Point out the four corners of the room. Designate the corners 25%, 50%, 75%, and 100% respectively. On go, have participants get up and stand in the corner that most represents the percentage of associates that regularly use SLII to communicate with them.

When people arrive at the corners, have them find ONE other person and share a story about how their associates have used SLII.

Take feedback and explain the goal of this section is to help leaders and their associates better apply SLII in daily work. Everyone will be able to move at least one corner higher than where they already are!

02:21-02:26

Why Situational Leadership* ||?

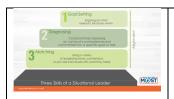
Presenter: Randy Cyphers

SAY: First, Situational Leadership II is a language for leading both yourself and those you lead. It's much more effective and efficient to communicate when you both speak the same language.

The second purpose of SLII is to increase the quality and quantity of conversations you have with the people you lead (and influence).

The third purpose of SLII is to help others develop their self-reliant problem solving skills.

By working with a Situational Leader, individuals develop competence, which increases their confidence and willingness to take responsibility for decision making.



Presenter: Randy Cyphers

SAY: The Three Skills of a Situational Leader are:

Goal Setting—Aligning on what needs to be done, when

Diagnosing—Collaboratively assessing an individual's competence and commitment on a specific goal or task

Matching—Using a variety of leadership styles, comfortably, to provide individuals with what they need (on specific goals and tasks)



Presenter: Randy Cyphers

SAY: Six SLII conversations that Situational Leaders use frequently are: Alignment Conversations—which are usually leader-led, and help the leader and team member to get on the same page around goals, development levels, and leadership styles

Style 1 Conversations—in which the leader provides direction

Style 2 Conversations—in which the leader provides coaching

Style 3 Conversations—in which the leader provides support

Style 4 Conversations—in which the leader delegates

One on One Conversations—which are led by individual contributors (team members or direct reports). In these conversations, team members speak up and ask for the direction and support they need, when they need it. One on One Conversations help leaders to calibrate their leadership style response to the situation—to the topics the direct reports want to talk about.

In all six of these conversations, leaders partner with the individuals they lead. Partnering means getting agreement and permission to use the leadership style that the person needs in the moment.

The ability to have these types of conversations is dependent upon actually KNOWING your team. It requires you to be sensitive to their needs, both personally AND professionally, but also knowing how to be direct and prescriptive when the situation calls for it.

Look at these conversations and tell the person across from you which of these will be the first conversation you have when you get home and why?

02:26-02:51

Presenter: Craig Dugan

DO: Introduce yourself and your role at Brookdale.

SAY: Let's put Situational Leadership II into practice.

DO: Divide the room into three sections. Have people remember their sections because each section will be assigned a specific scenario to evaluate.

SAY: Now, at your tables please form groups of four.

Great. Please turn to pages 12-15 in your handouts where you'll find four SLII scenarios.

Here's what you'll do:

In your group of four, select one person to read the scenario out loud to your team. As a team, determine the goal or task in the situation, diagnose the development level, and choose the correct leadership style response. Let's try the first scenario together.

DO: Read the first scenario and the answers directly from the handout. Give groups of four about 4-5 minutes to diagnose the situation and



determine the leadership style response.

NOTE: Use your SLII ANSWER KEY to debrief scenarios 1-4.

After four minutes, poll the room. Have people raise their hand if they chose each answer. Choose someone to share the rationale for their answer each time. Then share the correct answer below and the rationale behind it.

Affirm people for their participation.

Assign one of the remaining scenarios to each of the sections i.e. Scenario 2 to Section 1, Scenario 3 to Section 2, and Scenario 4 to Section 3.

Allow groups about 5 minutes to collaborate.

After 5 minutes, sound the attention getting device and have people turn their attention to you.

Review each section's designated scenario (only) and ask for 2-3 willing volunteers to share their answers with the larger group. Be sure each person shares the rationale for their answer. Then give the correct answer for that scenario. If appropriate, share the rationale behind the incorrect answers.

02:51-02:59

Presenter: Craig Dugan



SAY: Think about the diagnosing and matching experience you just finished. What did you learn? What insights did you gain?

What are the general principles about SLII that you discovered?

02:59-03:00

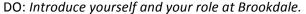
Presenter: Craig Dugan



DO: Announce the break, refreshments, and the start time of the next part of the Ops Functional Breakout.

03:30-03:36

Presenter: Ray Leisure



SAY: Welcome back!



Before our break, you wrote down general principles and insights about SLII you discovered during the scenario exercises.

Watch this video clip from Apollo 13. As you watch, think about how those principles and insights might have helped this situation.



DO: Click to play the video clip.



Presenter: Ray Leisure

ASK: How would SLII have helped the people in this situation?

DO: Take a few responses from willing participants. Repeat back each answer

so the entire room can hear it.

SAY: SLII is a practical leadership tool that can be used in ANY situation.

03:36-03:43 Presenter: Beth Mell Harris DO: Introduce yourself and mention your role at Brookdale. SAY: Let's dive into more practical application of SLII. To do that, we're going to have a little competition. Divide your table into two teams. Every team needs a name. Take 90 seconds to come up with a name for your team. Bonus points if you can come up with a team cheer. 😊 DO: Allow about 2 minutes for table groups to name their team. SAY: Shout out your team's name. DO: Allow time for people to shout. SAY: It sounds like we have a creative and competitive group of people in this room! It's time for the SLII Team Challenge DO: Hold up a copy of the SLII Team Challenge. Grab your SLII Team Challenge handout. Here's what you'll do. DO: Read the directions from the handout and then walk through your example. 03:43-04:03 Tell teams to be able to defend their answers! Allow about 20 minutes for the team challenge. This time includes teams sharing their challenges with each other and comparing answers. 04:03-04:09 Presenter: Beth Mell Harris SAY: Please turn to page 16 in your handouts. What new skills and knowledge did you acquire? What would you do differently next time? What did you learn about your leadership style that will be helpful later? What's next? How can you use these insights and increased knowledge in your role? You'll have 6 minutes to answer these questions. Allow about five minutes for people to complete these action steps. Then sound the attention getting device and have people return their attention to you. 04:09-04:30 PRESENTER: Mary Sue Patchett DO: Click to start fire. SAY: It's time for our fireside chat. Tell a quick story about a fireside chat you had. DO: Distribute S'MORES candy to each table. During a fireside chat, people are comfortable and cozy. Most often they feel free to share what's on their hearts or what matters most. They ponder burning questions, ask for insights, and perhaps seek clarification. What have you been eager to ask but haven't had the opportunity to ask it? This is your moment to ask [introduce leaders at the table] your burning

