



LeadForward

**Taking Care of the People
Who Take Care of People**

Building Career Pathways, Leadership Readiness, and Workforce Stability in Senior Living

Two Paths

*Same Potential.
Different Preparation.*

Path One: Dishwasher → VP

Path Two: Promoted without preparation



Did the Person Fail?
Or Did the System
Fail Them?

The Real Workforce Challenge

We don't have a talent problem.
We have a development system gap.

Potential exists everywhere — dining rooms, housekeeping, care departments, front desk, every shift.

Opportunity is inconsistent.



Opportunity Should Not Depend on ZIP Code

Potential is distributed evenly.
Opportunity is not.

The Responsibility of Leadership

Promoting someone is easy.
Preparing them is leadership.

*Advancement changes a title.
Development changes capability.*



Introducing LeadForward

A Workforce Operating System for Senior Living

Career Mobility

Leadership Readiness

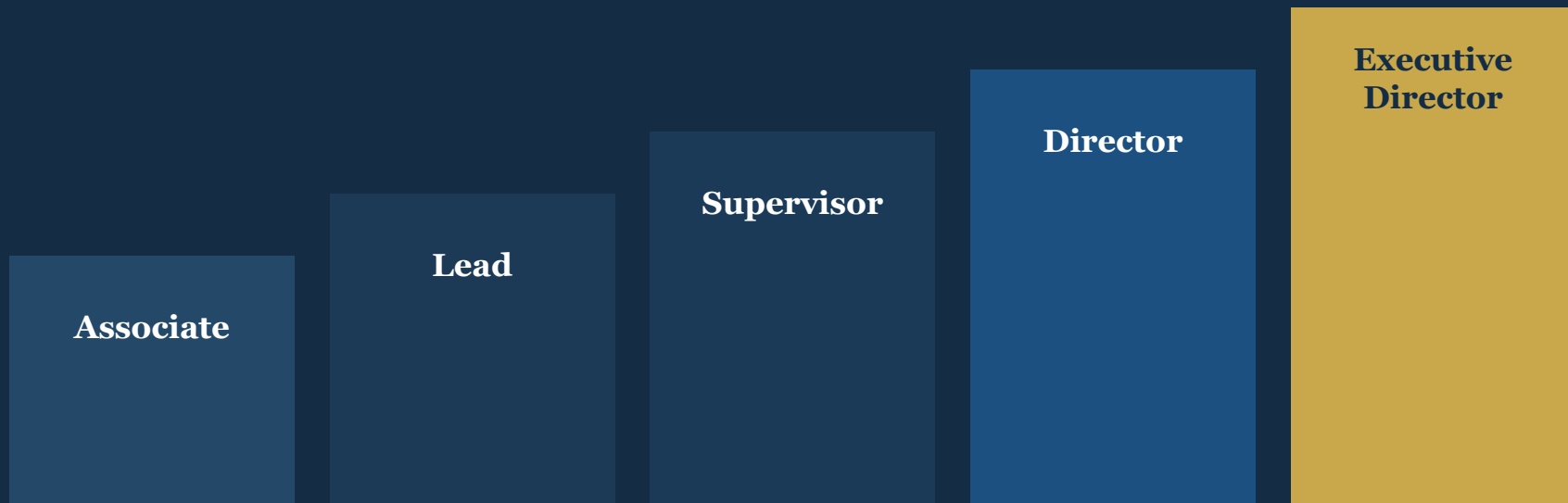
AI-Enabled Development

Governance

Opportunity Consistency

Career Ladder

Growth Should Be Visible



Career Lattice

Leadership Through Experience

Growth isn't always vertical.
Breadth of experience builds
stronger leaders.

*Roles that feel like dead ends
become launching points.*



Readiness Before Responsibility



Promotion is the outcome of development — not the beginning.

Leadership Evolution

What changes as responsibility grows

Associates

Perform the work

Leads

Coordinate the work

Supervisors

Manage performance

Directors

Develop leaders

Executive Directors

Create culture & alignment



Executive Director Readiness

Emotional Intelligence

Crucial Conversations

Systems Thinking

Culture Development

Whole-Community Leadership

Opportunity Consistency

1

Same advancement
framework

2

Same readiness
standards

3

Same interview
process

4

Same development
resources

Every community. Every associate.

AI as a Development Equalizer

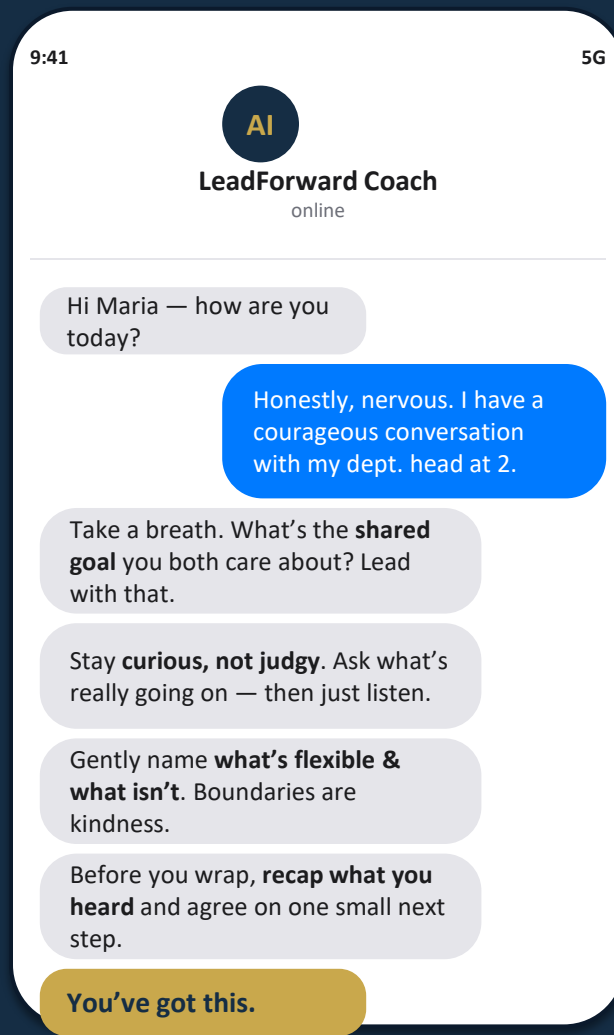
The future isn't AI replacing leadership.
The future is AI helping us develop
better leaders faster.

Consistent opportunity — at scale.

Coaching in the Moment

A leader pauses before a courageous conversation and prepares with their AI coach — in minutes, not weeks.

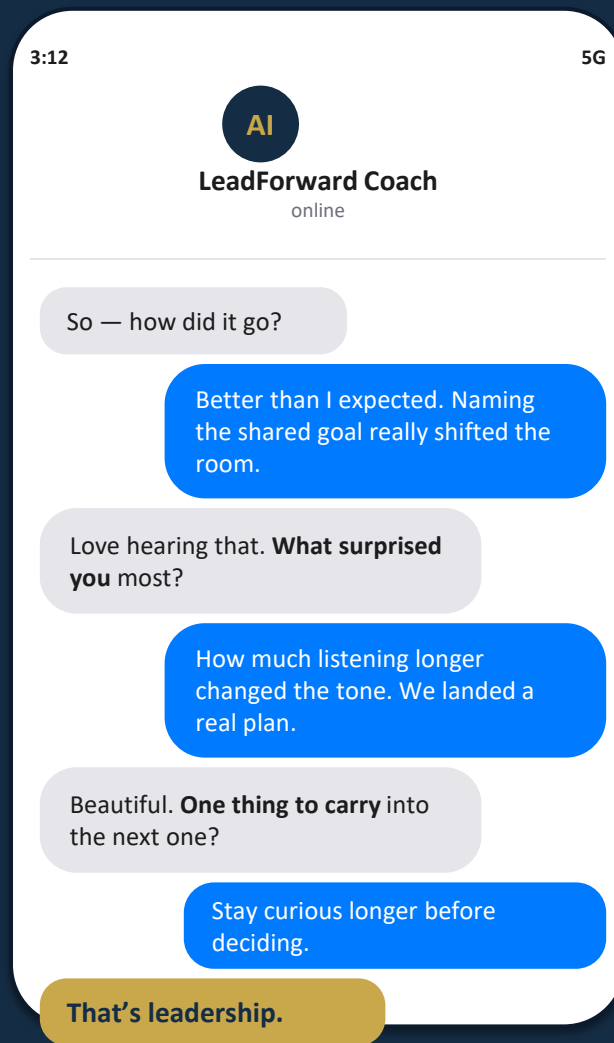
Coaching that meets leaders when they need it most.



After the Conversation

The same coach helps the leader reflect — turning one hard conversation into a lasting leadership lesson.

Reflection makes the next conversation even better.



Governance Creates Trust

Governance is not bureaucracy.
Governance is how we create fairness.

Fairness is how we create trust.

Implementation Roadmap

01

Standardize

02

Pilot

03

Scale

04

Optimize

Quality before scale. Lasting adoption.

30 / 60 / 90 Day Success

Promotion is the starting line — not the finish line.

30

DAYS

Stabilize

60

DAYS

Align

90

DAYS

Scale



Shared Ownership

Advancement is a team sport.

Managers

HR

Operations

Cross-Functional Leaders

Associates

LEAD Framework

Built on Principles, Not Personalities

First Principles Thinking

Systems Thinking

Change Management

Ladder of Inference

Trust Building

Measuring What Matters

If we measure promotions, we get promotions.
If we measure readiness, we get stronger leaders.

*Success isn't movement.
Success is preparedness.*

Industry Transformation

From Staffing Strategy to Workforce Strategy

Not simply better staffing. Better systems.

A photograph of an elderly Black man and a young white woman in blue medical scrubs walking together outdoors at sunset. The man is wearing a blue cardigan over a light-colored polo shirt and khaki pants. The woman has her hair in a ponytail and is wearing a name tag. They are both smiling and looking at each other. The background shows a house and some foliage.

LeadForward

We hire for heart.

We develop for readiness.

We promote for capability.

We support for success.

We make opportunity consistent.

A photograph of four diverse professionals (two women and two men) sitting around a table in a modern office setting, smiling and engaged in conversation. The background is softly blurred, showing office shelves and warm lighting.

Thank You

Presenter Credits

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Appendix A: Career Ladder Architecture

The ladder standardizes expectations across communities while preserving flexibility for local operations.

Visible pathways. Defined expectations. Observable readiness.

Standard Levels Used Across Departments

Level	Title Pattern (example)	Primary Scope	Typical Readiness Evidence
L1	Associate I	Learns core tasks; works with close supervision	Orientation complete; basic skills validated; attendance/reliability expectations met
L2	Associate II / Senior Associate	Independently performs full role; supports peers informally	Skills checklist complete; quality standards met; demonstrates resident/customer service behaviors
L3	Lead / Shift Lead	Leads on shift; trains others; handles routine issues; escalates appropriately	Trainer sign-off; peer/manager feedback; can run shift routines; basic documentation competence
L4	Supervisor / Assistant Manager	Schedules/assigns work; coaches performance; owns metrics for a unit/shift	Leadership fundamentals complete; can coach/document; meets KPI targets; cross-functional collaboration
L5	Department Head / Director	Owens department outcomes (quality, people, budget); ensures compliance; drives improvements	Bench readiness review; sustained results; budget/labor basics; survey readiness; talent development evidence

Ladder Example: Care / Wellness

Typical ladder: Caregiver (L1) → Caregiver II / Senior Caregiver (L2) → Lead Caregiver / Shift Lead (L3) → Resident Care Coordinator / Care Supervisor (L4) → Wellness Director / Director of Resident Care (L5)

1	L1 → L2 Gates	ADL support competence validated; documentation basics; strong attendance; demonstrates resident-centered communication.
2	L2 → L3 Gates	Can precept/train; safe transfer/ambulation practices; de-escalation basics; can run shift routines and handoffs.
3	L3 → L4 Gates	Can coach performance; incident reporting competence; scheduling/assignment basics; survey readiness behaviors.
4	L4 → L5 Gates	Compliance leadership, staffing and labor basics, family communication, cross-department coordination, sustained outcomes (care quality + retention).

Ladder-Based Promotion Process

- 1 Interest Captured** Associate selects a pathway and next role (simple form + manager conversation).
- 2 Skills Checklist** Manager/trainer validates skills using observable behaviors (not opinions).
- 3 Learning Path** Microlearning + shadow shifts + policy sign-offs.
- 4 Readiness Review** Brief panel (department head + HR + cross-functional leader) confirms evidence and consistency.
- 5 Promotion + Offer** Includes clear expectations, pay change (if applicable), and 30/60/90-day success plan.
- 6 Post-Promotion Support** Coaching cadence and “early warning” check-ins at weeks 2, 4, and 8.

For promotions into roles with expanded leadership, coaching, safety, documentation, or cross-functional responsibility (especially L3 and above), add an interview step using a standardized rubric. The interview confirms readiness through job-related evidence, consistent questions, and calibrated scoring – not manager opinion alone

Appendix B: Career Lattice Framework

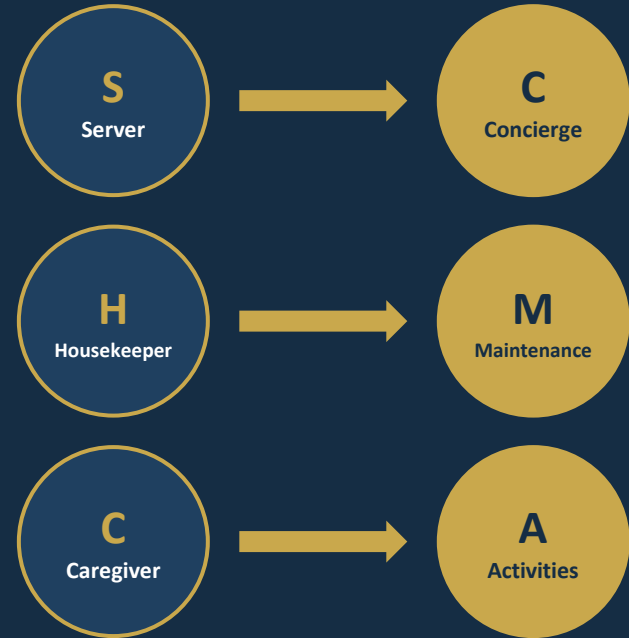
Retention improves when associates see multiple pathways, not just upward movement.

Breadth of experience builds stronger leaders.

Cross-Department Mobility

- **Eligibility:** associates in good standing can apply for lateral moves after meeting core competency expectations and completing any role-specific safety training.
- **Skill translation:** customer service, reliability, teamwork, and documentation quality transfer across departments.
- **Examples:** Server (L2) → Concierge (L2); Housekeeper II (L2) → Maintenance Assistant (L1/L2 depending on skill); Caregiver II (L2) → Activities Associate II (L2).
- **Purpose:** expands retention options and reduces “dead-end” roles while building staffing flexibility.

MOBILITY PATHWAYS



Appendix C: Interview Framework

Structured interviews reduce subjectivity and improve consistency across communities.

Evidence-based advancement decisions.

Interview Framework

1 Structured promotion interview

Candidate completes a standardized interview using the role-specific question set tied to published competencies and readiness gates for the target role.

2 Anchored rubric scoring

Each interviewer scores independently using the 1–5 anchored rubric, documenting job-related evidence and examples rather than general impressions.

3 Panel calibration

Panelists compare evidence, discuss score differences, and confirm a final calibrated rating so a “meets” standard is applied consistently across communities.

4 Decision rule

Promotion proceeds only when rubric results, checklist completion, and readiness evidence align; gaps trigger a documented development plan and re-review timing.

5 Interview record retained

Completed interview packet, scores, evidence notes, and final rationale are retained as part of promotion documentation for fairness, auditability, and future coaching.

Appendix D: Executive Director Readiness

Executive Director readiness requires emotional intelligence, systems thinking, crucial conversations, culture leadership, and whole-community accountability.

The skills that made you successful before are not the skills you need next.

Department Head → Executive Director: EI & Crucial Conversations Framework

Strengthen the leadership ladder from Department Head/Director (L5) to Executive Director (L6) by explicitly defining the emotional intelligence (EI) and crucial conversation skills required to lead through people, sustain culture, and drive performance. Use these competencies in readiness gates, interview rubrics, and coaching plans.



Scope Shift: Department Head (L5) vs. Executive Director (L6)

Department Head / Director (L5)	SCOPE SHIFT	Executive Director (L6)
Department outcomes (quality, people, budget) and cross-functional partnership	Primary accountability	Whole-community outcomes (operations, culture, occupancy, quality, financials) and external relationships
Leads a team; develops supervisors/leads; manages performance within department	People leadership	Leads leaders; sets culture; owns leadership bench and team effectiveness across all departments
Corrective coaching, conflict mediation, family escalations within scope	Crucial conversations	High-stakes accountability, cross-department conflict, family/partner escalations, regulator/survey interactions, crisis communication
Self-management + relationship management to stabilize a department	EI requirement	Advanced self-awareness + systems empathy to stabilize the whole building under pressure

Observable Behaviors by Ladder Level (Promotion Anchors)

Department Head (L5) — “Meets”	PROMOTION ANCHOR	Executive Director (L6) — “Meets”
Stays calm during staffing challenges; keeps department focused; models professionalism.	Stability under pressure	Stabilizes the whole community during disruptions (call-outs, survey, crisis) and prevents cross-department spillover.
Delivers timely coaching and corrective conversations; documents per policy; improves performance within department.	Coaching & accountability	Builds a culture of accountability across leaders; coaches department heads; addresses toxic behavior early.
Mediates conflicts within team; collaborates with peers; escalates appropriately.	Conflict navigation	Resolves cross-department conflict; aligns leaders to one standard; prevents “silo wars.”
Handles routine escalations within scope; communicates clearly and empathetically; closes the loop.	Family/resident escalation	Leads high-stakes escalations; maintains trust under emotion; coordinates unified communication and action.
Notices morale and burnout signs in their department; takes action (recognition, workload adjustments, clarity).	Culture sensing	Reads building-wide culture; addresses systemic root causes; develops leaders to improve engagement/retention.
Consistent standards; avoids favorites; makes decisions transparently.	Integrity and fairness	Establishes fairness norms across departments; calibrates leaders; reduces inconsistency and bias.

Emotional Intelligence Skill Sets (Job-Observable)



Self-awareness

recognizes triggers, strengths/limits, and how their presence impacts others.



Self-management

stays steady under pressure, manages reactivity, and chooses an effective response.



Empathy & perspective-taking

accurately reads staff, residents, and families; separates facts from assumptions.



Relationship management

builds trust, repairs ruptures, and aligns people to shared standards.



Social awareness (culture sensing)

notices morale, informal leaders, and early warning signs of burnout or conflict.



Accountability with care

holds standards without humiliation; balances compassion and performance expectations.

Crucial Conversations Capabilities



Prepare

clarify purpose, facts, desired outcome, and boundaries (policy, safety, compliance).



Start with safety

set a respectful tone; reduce defensiveness; name shared goals.



State facts, then impact

use specific observations; avoid labels; connect to resident experience and standards.



Invite dialogue

ask for perspective; listen; test assumptions; summarize accurately.



Hold the line

make clear requests, timelines, and consequences; document appropriately.



De-escalate

respond to emotion without absorbing it; keep the conversation productive.



Close the loop

confirm commitments, follow-up plan, and communication to others who need to know.

Appendix E: AI Enablement

AI supports development, coaching, and readiness preparation.
Humans make all hiring and promotion decisions.

AI scales opportunity. Humans make decisions.

How AI Supports EI Growth & Crucial Conversation Mastery

Conversation practice on demand



AI generates scenario practice (call-outs, poor performance, family escalation, interdepartment conflict) so leaders rehearse language before real conversations.

Role-based simulation modes



Draft (outline facts, outcome, boundaries), Rehearsal (AI plays employee/family), Debrief (reflection + learning capture), and Micro-skill drills (active listening, labeling emotions, setting boundaries, clear asks).

Coaching templates



AI drafts conversation plans using your policies and leadership model (facts → impact → ask → consequence → follow-up), which leaders personalize.

Language quality checks



AI flags vague feedback (“be more professional”), biased/loaded wording, or missing specifics, and suggests clearer, observable language.

Reflection prompts



After tough conversations, AI guides leaders through a short debrief (what happened, what I felt, what I assumed, what I’ll do next time) to build self-awareness.

Standardized Interview Questions & Scoring Rubrics

AI can help you generate and maintain a standardized interview system for each advancement role (and each level) by producing a **structured question bank**, **anchored scoring rubrics**, and **calibration materials**—then updating them as roles, policies, and performance signals change.

This reduces “manager-by-manager” subjectivity while keeping decisions transparent and job-related.

What AI Generates (Per Role/Level)



Question bank mapped to competencies

8–12 behavioral questions aligned to the ladder’s core competencies plus 3–5 role-specific questions (e.g., medication safety, dining service recovery, work order prioritization, CRM discipline).



Required prompts for consistency

the same “must-ask” questions used across communities for that position (with optional add-ons).



Scoring rubric (anchored)

a 1–5 scale with behavioral anchors defining what a “1, 3, and 5” answer looks like (and common red flags).



Evidence checklist

what documents/observations can support the interview (skills checklist, training completions, quality audits, resident feedback, etc.).



Interview guide for managers

follow-up probes, what to listen for, and how to avoid leading questions.



Candidate debrief template

standard summary fields so panels compare candidates on the same dimensions.

Appendix F: LeadForward Dashboard and Prototypes

A single view that brings each associate's coaching, strengths, goals, and readiness together in one place.

Illustrative mockup. Sample associate and data shown for design purposes.

LeadForward Dashboard

Maria Alvarez · Caregiver II (L2) → Target: Lead Caregiver (L3)

12

Coaching Sessions

Next in 3 days

78%

Readiness Score

On track

3 / 5

Goals Met

Readiness gates

8

Months Enrolled

Since Oct 2025

Current Strengths

Resident-Centered Communication 92%



Reliability & Attendance 86%



Safe Transfer & Ambulation 72%



De-escalation Basics 55%



Peer Coaching & Precepting 40%



Readiness Progression

Caregiver II (L2) → Lead Caregiver (L3)

L1

L2

L3

L4

L5

Completed · Current · Upcoming

Readiness gates: 3 of 5 met



Next gate (L2→L3): run shift handoffs independently and complete de-escalation practice.

Interview Prep Sessions

Associates rehearse real promotion questions with their AI coach, get scored on an anchored rubric, and see exactly where to sharpen.

Practice before the panel — not in front of it.

Interview Prep

Mock interview · Lead Caregiver (L3)

4 sessions completed · Avg score 3.8 / 5

QUESTION 3 OF 8 · COACHING A PEER

“Tell me about a time you gave a peer corrective feedback. What did you say, and what changed afterward?”

AI FEEDBACK

4 / 5

Strong: you named the behavior and its impact on residents.
Sharpen: agree on a next step and a follow-up date.

RECENT SESSIONS

Lead Caregiver (L3) · Jun 12

3.8

Executive Director (L6) · May 28

4.1

Lead Caregiver (L3) · Jun 5

3.5

Sample Interview Question Framework

Behavioral questions mapped to competencies and scored on a 1–5 anchored rubric (**1 Below** · **3 Meets** · **5 Exceeds**). Examples shown across levels.

Level	Competency	Sample Behavioral Question	What a “Meets” (3) Looks Like
L3	Coaching performance	“Tell me about a time you corrected a peer’s performance. What did you say and what happened?”	Gives specific, respectful feedback; documents it; follows up; performance improves.
L3	De-escalation	“Describe a tense moment with a resident or family. How did you keep it calm?”	Stays composed; names the emotion; applies standards; closes the loop.
L6	Crucial conversations	“Walk me through a high-stakes conversation with a department head missing standards.”	Leads with the shared goal; states facts and impact; makes a clear ask; sustains accountability.
L6	Culture & systems	“How have you addressed a building-wide morale or retention problem?”	Finds root causes; develops leaders; shows measurable engagement or retention gains.