

# forward



LeadingAge®  
Washington

## Choose *your* Role!

Director of Visionary Thinking?  
Chief Collaboration Officer?  
Join us as we imagine the new  
landscape of serving older adults.

2021

70TH ANNUAL VIRTUAL CONFERENCE & EXPO

JUNE 15 - 17, 2021



## 70TH ANNUAL VIRTUAL CONFERENCE & EXPO

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*LeadingAge*<sup>™</sup>  
*Washington*

**To move Forward, doesn't mean to push past where we have been.** On the contrary, to truly move our organizations forward, we must leverage where we have been to become stronger and smarter. Our future may look different than today. Our teams will need to evolve to meet the challenges ahead. Our organizations will succeed by bridging where we've been with new skills and knowledge.

Areas of focus for our Virtual Conference will be transforming the continuum of care to better meet consumer needs, demands and expectations; developing and retaining a skilled workforce; best practices in resident care models (including, but not limited to, culture change); quality improvement and accountability; and new technologies for older adult service delivery. Please join us, as we move **Forward Together!**

# forward

# SPECIAL ANNOUNCEMENTS

## EDUCATION FOCUS

Participants may attend any education session.

The sessions have been designed for areas of interest in:

- Care & Services
- Design & Project Management
- Financial Management
- Fund Development
- Leadership & Strategy
- Management & Operations
- Marketing & Public Relations
- Partnership & Collaboration
- Technology
- Wellness & Life Enrichment
- Workforce Development

## SESSIONS ARE DESIGNED TO IDENTIFY EMERGING TRENDS IN THE FIELD OF AGING;

- Explore innovative ways to provide services in the future;
- Identify new partners and opportunities;
- Retool your community with the latest information; Understand healthcare reform and your next steps; And more...

## EDUCATION CREDITS

4 Keynotes, 10 Breakouts  
with 80+ sessions to choose from over 3  
days. Up to 20 Education Credits/SHRM

## SPECIAL NEEDS

Do you have special needs that we can address to make your participation more enjoyable? Please note when you register online/or email Cassi at [cmeritt@LeadingAgeWA.org](mailto:cmeritt@LeadingAgeWA.org)

## CONFIRMATION

Confirmations are emailed following each completed online registration. If you do not receive a confirmation, email Cassi at [cmeritt@LeadingAgeWA.org](mailto:cmeritt@LeadingAgeWA.org)



## VIRTUAL LOGIN DIRECTIONS

- \* EngageZ Virtual Conference site link.  
[www.engagez.net/leadingagewashington](http://www.engagez.net/leadingagewashington)
- \* Your email is your Sign-In
- \* No password required.
- \* Sessions will be available On Demand for 90 days after July 1st.



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## OUR SPECIAL GUESTS

### KEYNOTE SPEAKERS & HEADLINERS

Join us as we delve into the big ideas that are shaping the future of our organizations and the people they serve.



**DR. RANDY ROSS**

CEO of Remarkable, Author  
*Hope Rises: Make Your Life & Leadership Soar*



**CAROL SILVER ELLIOTT**

Board Chair, LeadingAge ; President  
& CEO, Jewish Home Family  
*In Forward Motion*



**JOHN H. COCHRANE III**

President & CEO, HumanGood  
*The Changing Landscape of Senior Living*



**DENISE BOUDREAU-SCOTT**

President, DRIVE  
*The No-Win Situation*



**STEVE MORAN**

Founder, Senior Living Foresight  
*Telling Stories That Change The World*



**DR. KELLY TREMBLAY, PHD**

Audiologist, Neuroscientist and Author  
*Rethinking Care for Older Adults: WHO Guidelines on Community Level Interventions*



**JONATHAN FANNING**

Speaker and Author  
*Passion and Purpose – Rediscovered!*



**MARY K. MUÑOZ**

Senior Managing Director  
Ziegler | Senior Living  
*Moving on From COVID: What's Next for Senior Living*



**forward**

**June 15- 17th 9:00 AM - 1:00 PM (3 1/2 days)**

**Nursing Practice in Community Based Care - Assisted Living Training**

**Instructor: Demi Haffenreffer, Consultant**



The class will provide the most contemporary information related to the standards and requirements in Community Based Care and to assist the participants in understanding the “systems perspective” when relating to the standards and requirements. The program includes two days of didactic/lecture material and exercises/demonstrations related to the systems and processes required for a quality operation as well as the overall requirements and regulations, safety and infection control, and the nurse’s role in training and forwarding the facility systems and processes. The third day is devoted entirely to quality and the survey process. The pre and post assignments are designed to improve comprehension of the subject matter. **(20 CEs)**

# AGENDA AT A GLANCE

## Virtual Conference includes:

- \* Experience **Box**
- \* EXPO Hall
- \* Over 80 sessions
- \* Community Tours
- \* Residents, Staff and Family Stories
- \* Wellness Breaks / **Ted Talks**
- \* Networking & more...

P.S. Sessions available for 90 days beginning July 1st

## MONDAY, JUNE 14

10:00 am - Noon

**Virtual Annual Membership & Board Meeting**

## TUESDAY, JUNE 15

7:30 am

**Virtual Conference Doors Open**

8:15 am

**Welcome & Introductions:** Glen Melin, Board Chair

8:30 am - 9:30am

**General Sessions 1:** Jonathan Fanning, Author and Speaker  
*Passion and Purpose - Rediscovered!*

9:40 - 10:40am

**Breakout Session 1**

10:45 am - 1:00 pm

**EXPO Showcase** Business leaders sharing "*Best Practices*"  
*Pre & Post COVID*

1:15 - 2:15 pm

**Breakout Sessions 2**

2:30 - 3:30 pm

**Breakout Sessions 3**

## WEDNESDAY, JUNE 16

8:15 am

**Welcome & Introductions:** Glen Melin, Board Chair

8:30 - 9:30 am

**General Session 2:** John H. Cochrane, President & CEO, HumanGood  
*The Changing Landscape of Senior Living*

9:30 - 11:30 am

**EXPO Showcase** Business leaders sharing "*Best Practices*"  
*Pre & Post COVID*

11:45 am - 12:45 pm

**Breakout Sessions 4**

1:00 - 2:00 pm

**Breakout Sessions 5**

2:15- 3:15 pm

**Breakout Session 6**

3:30 - 4:00 pm

**Residents' Recogniton** Sharing Your COVID Stories #Seniors Better Together

## THURSDAY, JUNE 17

8:15 am

**Welcome & Messages:** Glen Melin, Board Chair

8:30 - 9:30 am

**General Session 3:** Randy Ross, Author & Speaker  
*Hope Rises: Let Your Life and Leadership Soar*

9:45 - 10:45 am

**Breakout Session 7**

11:00 am - Noon

**Breakout Session 8**

12:15 - 1:15 pm

**General Session 4:** Carol Silver Elliott, Board Chair, LeadingAge, and President & CEO, Jewish Home Family - *In Forward Motion*

1:30 - 2:30 pm

**Breakout Session 9**

2:45 - 3:45 pm

**Breakout Session 10**

approx. 20 education credits/SHRM inc. Membership & Board Meeting and EXPO Hall

LeadingAge Washington's Education Programs are made possible by the generous support of our 2021 Business Partner Gems and Annual Conference Sponsors. Through collective power we bring opportunities for increasing our members' Value, Growth, and Success!

*Thank You!*

## \$10,000 DIAMOND MEMBERS



## \$7,500 RUBY MEMBERS



## \$5,000 SAPPHIRE MEMBERS



## \$2,500 EMERALD MEMBERS



## CONFERENCE SPONSORS





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## Tuesday, June 15th, 8:30 am – 9:30 am Jonathan Fanning, Speaker & Author

### **Passion and Purpose - Rediscovered**

A year from now, you'll be living with a deeper sense of passion and purpose... or not! You've experienced moments of clarity, moments filled with passion, moments with tremendous energy and conviction. You've also experienced the lack of these gifts. In this unique [virtual] keynote, you will rediscover secrets that change everything. Reimagine and magnify your ability to be an agent of change...Reawaken "who we are, what we do, and why we do it" for 2021 and beyond. This program applies to you, whether you lead a company, non-profit, team, family, or just yourself.

*Our first 300 registrants received Jonathan's book "Who are you BECOMING?" included in the Experience Boxes*

## **SESSION 1 - TUES., JUNE 15TH 9:40 - 10:40 AM**

### **► COVID-19 in Senior Care: Lessons Learned**

*Pamela Kaufmann, Partner, Hanson Bridgett LLP; Gabriela Sanchez, Shareholder, Lane Powell PC*

COVID has presented our members with the challenge of a century. Come explore what we have learned, from testing to reporting, from isolation to vaccination. Let's examine how we balanced residents' need for social contact with safety precautions, worked creatively with staff to address their needs, cushioned the economic blow of COVID, pivoted to become virtual, tried to protect ourselves from legal liability, strived to vaccinate our teams equitably and efficiently, and learned of disparities in COVID transmission and outcomes based on ethnicity. We will end by identifying tools to be better prepared for the next health emergency.

**Focus: Public Policy & Legal Issues**

### **► Creatively Engage Your Residents and Clients with FREE Library Materials!**

*Jennifer Kulik, PhD, President and Founder, Silver Kite Community Arts; Wendy Pender, Older Adults Program Coordinator, King County Library System*

Are you an Activity Director or Life Enrichment Coordinator? Do you need ideas and FREE resources for your residents and/or CEU's? Learn the wealth of FREE library resources such as themed kits, downloadable movies, large print and audiobooks available to you and your residents! Learn ways to use these resources in a dynamic workshop with talented Jennifer Kulik, PhD, CEO and Founder of Silver Kite Community Arts!

**Focus: Care & Services**

### **► What is the "New" Normal for Infection Prevention?**

*Mark Stibich, Chief Epidemiologist, Forefront Healthcare*

Environmental services, foods services and infection prevention did so much in response in COVID-19. What do we want to keep?

**Focus: Care & Services; Clinical**

### **► Mission Uncopyable: Creative Ideas and Strategies to Move Us Forward**

*Kay Miller, Marketing Director, The Adventure LLC*

According to a recent article in INC Magazine, "Great Ideas Don't Happen in a Vacuum." Get your creative juices flowing as Kay Miller leads a lively mastermind/brainstorm discussion. Hear the very best ideas - the ones that have worked for your peers during this challenging chapter of COVID. Share your own successes and let them help you make them even better. Walk away energized, with new ideas to engage residents, create a positive atmosphere, drive word-of-mouth referrals and increase move-ins. Turn your residents into your biggest fans and become your prospects' first choice!

**Focus: Marketing, Philanthropy & PR; Partnership & Collaboration**

## **SESSION 1 - TUES., JUNE 15TH 9:40 - 10:40 AM (CONT'D)**

### ► **Moving on From COVID: What's Next for Senior Living**

*Mary Muñoz, Senior Managing Director, Ziegler*

COVID-19 has hit senior living with a sledgehammer--occupancy decline, stressed and sometimes sick workforce, insufficient PPE, and vulnerable residents. With vaccinations finally becoming ubiquitous, how do you move forward from here? This session will cover the broad impact of COVID-19 on our industry, and look at ways providers can re-think their approach to being relevant in the future. From technology to post-acute care to architectural design and more, it's time to turn the focus from survival to opportunity.

**Focus: Financial Management; Leadership & Strategy**

Sponsored by: **HCMP** Low Offices | Hillis Clark Martin & Peterson P.S.

### ► **Creating Smart Senior Living Facilities**

*Steve Wagman, National Healthcare Business Leader and Jerry Folsom, Smart Healthcare Solutions Director, Siemens Smart Infrastructure*

Siemens has a vision for smart senior living facilities. Working with clients around the globe, Siemens is focused to improve resident experiences, drive better operating results and enhance staff experiences. In addition to providing visionary solutions, Siemens also has innovative approaches to reduce construction costs, timelines and risks, including:

- Making facilities safer and more welcoming by addressing COVID-19
- Enhancing Resident and Family Experiences
- Reducing Falls and Healthcare Associated Infections
- Improving Staff Satisfaction and Reducing Workloads
- Improving Operational Results and Reducing Energy Consumption
- Using Smart Building Approaches to Reduce Construction Costs, Timelines and Risks

**Focus: Design & Project Management**

### ► **Forging Ahead: Bayview's Repositioning and Rebranding**

*Jennifer Fleming, Principal, Rice Fergus Miller, Architects, Interiors, & Master Planning; Nancy Weinbeck, CEO, Bayview; Cynthia Thurlow Cruver, Principal, 3rdThird Marketing*

Through a wide range of voices highlighting the projects lessons and outcomes, our panel will explain where Bayview began and why they decided to reposition the campus. We will hear from Bayview residents about the redesign and how it brought life and vibrancy to the place they call home. We will review analytics from before and after the simultaneous renovation and rebranding that started Bayview on a trajectory for success and ensured their strong financial position. Lastly, RFM will reveal the design concept—how we honored the building's history while equipping it to serve the modern-day needs of every resident.

**Focus: Marketing, Philanthropy & Public Relations**

Sponsored by: **HCMP** Low Offices | Hillis Clark Martin & Peterson P.S.

## **SESSION 1 - TUES., JUNE 15TH 9:40 - 10:40 AM (CONT'D)**

### ► **The No-Win Situation**

*Denise Boudreau-Scott, President, Drive*

You don't have to feel overwhelmed with a heavy workload, only to end the day feeling like you have nothing to show for it! Leaders who are stretched too thin produce mediocre results and have far more resentment and burnout than most! This webinar aims to help you, your organization and your team, to perform at your best through simple strategies that optimize an individual's potential and overcome the impacts of stress and overwhelm for good. Ditch what's holding you back and get on with being your best! Get out of The No-Win Situation, for good!

**Focus: HR/Workforce; Leadership & Strategy; Management & Operations**

### ► **Post-Acute Care Networks: Managing in a Managed Care World**

*Arlene Jaroscak, LNHA, RN, Vice President of Network Management & Quality and Grant Swemba, Post-Acute Contracting & Alternative Payment Initiatives Director, Strategic Health Care, LeadingCare Network NW*

Healthcare consumers are increasingly seeking managed care organizations to administer their Medicare health care benefits. This shift has highlighted the importance of developing comprehensive relationships with managed care organizations to achieve improved outcomes. This session will discuss how collaborating with peers in a post-acute care network can provide valuable resources and supports to help strengthen your managed care position, improve your quality and value-based outcomes, and relieve the burden of credentialing and contracting, allowing your staff to better focus their time and talents within your facility.

**Focus: Leadership & Strategy; Financial Management**

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# MEET OUR EXHIBITORS

LIVE EXPO HOURS:

Tuesday, June 15th, 10:45 a.m. 1:00 p.m.

Wednesday, June 16th, 9:30 - 11:30 a.m.

The EXPO Hall will be available 24/7  
for your convenience!

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[www.3rdthirdmarketing.com](http://www.3rdthirdmarketing.com)

**A/R SNF Solutions**  
[www.snf-solutions.com](http://www.snf-solutions.com)

**Avera eCare Senior Care**  
[www.averaecare.org/ecare](http://www.averaecare.org/ecare)

**Cain Brothers**  
[www.cainbrothers.com](http://www.cainbrothers.com)

**Compliance Store, The**  
[www.thecompliancestore.com](http://www.thecompliancestore.com)

**Comprehensive Risk Management/Risk Finance**  
[www.compriskmgt.com](http://www.compriskmgt.com)

**Consonus Healthcare Services**  
[www.consonushealth.com](http://www.consonushealth.com)

**Culinary Coach Consulting**  
[www.culinarycoach.us](http://www.culinarycoach.us)

**Eldergrow**  
[www.eldergrow.org](http://www.eldergrow.org)

**Encore Rehabilitation**  
[www.encorerehabilitation.com](http://www.encorerehabilitation.com)

**Forefront Healthcare**  
[www.forefronthealthcare.com](http://www.forefronthealthcare.com)

**Harmony Healthcare International (HHI)**  
[www.harmony-healthcare.com](http://www.harmony-healthcare.com)

**Health Resource Services/Premier**  
<https://hrsgpo.com>

**HUB International**  
[www.hubinternational.com](http://www.hubinternational.com)

**iN2L**  
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**Seniors Better Together**  
[www.seniorsbettertogether.com](http://www.seniorsbettertogether.com)

**Shaw Contract**  
[www.shawcontract.com](http://www.shawcontract.com)

**Sodexo Senior Living**  
<https://us.sodexo.com/industry/seniors.html>

**Unidine**  
[www.unidine.com](http://www.unidine.com)

**Walsh Construction**  
<https://walshconstruction.com>

**Washington Relay**  
[www.washingtonrelay.com](http://www.washingtonrelay.com)

**Washington State Housing Finance Commission (WSHFC)**  
[www.wshfc.org](http://www.wshfc.org)

**Wattenbarger Architects**  
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- Nonprofit facilities and equipment
- Energy-efficiency upgrades



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### Contact me!

**Keri Williams**  
[keri.williams@wshfc.org](mailto:keri.williams@wshfc.org)  
**(206) 287-4404**

## SESSION 2 - TUES., JUNE 15, 1:15 - 2:15 PM

### ► **Dining for Health & Dollars: Presenting the Latest Trends and Tastes of the Modern Elder (Part 1)**

*Mike Peacock, Executive Chef & Culinary Coach; Randi Saeter, MBA, RD, LNHA, Community Coach, Culinary Coach Consulting; Don Warfield, Vice President Sales & Marketing Community Coach, 3rdThird Marketing*

Learn how to create a modern dining experience that goes beyond the institutional approach by utilizing fresh foods, local vendors, innovative recipes and proper techniques. It's time to provide a consistent world-class dining experience that will excite your residents in all levels of care.

**Focus: Financial Management; Dining; Wellness & Life Enrichment; Management & Operations**

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### ► **The Touching Journey of Infection Control**

*Patti Garibaldi, Director of Clinical Consulting, Consonus Healthcare Services*

2020 was a year of infection control focus. We don't look at our environment in the same way. As we have lived through Focused Infection Control Surveys, Federal, State and County policy changes, we have continued to strengthen our infection control practices. What we once excelled at has led to more stringent eyes on everything.

We will discuss the importance of surveillance monitoring and how to audit your environment for compliant practices. We'll discuss the importance of developing an infection control team approach with your Infection Preventionist and IDT and embrace the infection control "daily reporter" for rapid outcome intervention.

**Focus: Care & Services; Clinical**

### ► **Considering a Major Capital Campaign? How to Grow Philanthropic Potential and Raise Capital Funds to Support Your Community (Part 1 of 2)**

*Karen Rotko-Wynn, CFRE, Chief Business Enterprise Officer, The Alford Group* Whether you are seeking to raise additional funds to support major projects & initiatives or to embark on a major capital campaign, there are fundamental pieces of the puzzle that need to be in place. In this two-part session, participants will learn how to prepare for a major fundraising effort, beginning with creating a culture of philanthropy within your internal staff; creating a compelling case for support to articulate your vision; building leadership to identify and cultivate prospective donors; and the importance of a Feasibility Study prior to a major campaign launch. This session will walk attendees through the process from beginning to end, starting with an internal commitment to building external stakeholders and everything in between. There will be opportunities to interact with each other to share ideas and discuss opportunities, challenges and vision around how the campaign will make a difference in the lives of the people within your community – both for your staff and your residents.

**Focus: Fund Development, Marketing, Finance and Leadership**

Sponsored by:  **HCMP**  
Low Offices  **Hillis  
Clark  
Martin &  
Peterson P.S.**

## **SESSION 2 - TUES., JUNE 15, 1:15 - 2:15 PM (CONT'D)**

### **► Building Communities Through Inclusion and Belonging: Understanding and Accepting Differences. We All Win**

*Jodi Davidson, VP, Global Diversity and Inclusion, Sodexo*

How comfortable are your team members in dealing with discussions on Diversity and Inclusion? Are you successfully prepared to attract the new generation of Seniors or the new workforce? Do your employee and residents feel they can be their "Authentic Self"? Learn how to move your community FORWARD in our diverse world to attract diverse talent and residents and create an environment where everyone feels welcome and genuinely contributes to your success.

**Focus: Management & Operations**

### **► Growth Strategies: The Not-for-Profit Senior Living Imperative**

*Sarkis Garabedian, Managing Director and Daren Bell, Director, Ziegler; Paul Aigner, Vice President of Real Estate Development, Transforming Age; David Knight, Senior Housing Executive/Consultant and Ted MacBeth, Vice President of Development, GSI Research; Jay Woolford, Executive Director, SHAG*

The past year has been one of tremendous upheaval in the senior living sector. How providers rebound and take advantage of opportunities to innovate, evolve and grow to meet the needs of the aging population will be critical. Providers will absolutely need to adjust to the changes brought forth by the pandemic, such as elevated consumer expectations and accelerated technology adoption to name a few. The future communities and suite of services will look different. They need to. . Not-for-profit providers need to seize these opportunities and commit to strategic growth endeavors before the not-for-profit market share declines even further.

**Focus: Leadership & Strategy**

Sponsored by:



### **► The L&I Claims Process: Response, Strategy, Mitigation and Resolution. - Wash, Rise, Repeat**

*Laura Poyer, Senior Claims Lead and Scott Dehem, Vice President of Claims, Risk Finance*

Workplace injuries can be devastating both physically and financially for all parties involved. Please join this workshop to meet Risk Finance, the advocates LeadingAge has partnered with to provide its members worker's compensation claims service and advocacy. Learn the preparation, strategy, and mitigation techniques necessary to help your employee's recovery, as well as how to manage and mitigate claim costs to reduce impact to future premiums.

**Focus: Management & Operations; Finance**

## **SESSION 2 - TUES., JUNE 15, 1:15 - 2:15 PM (CONT'D)**

### ► **End of the War: Align Sales and Marketing**

*Lola Rain, Growth Strategist, Senior Living Foresight and Russell Rush, Managing Partner, R3R1 Science of Selling Academy*

Have you ever wondered why there is tension between sales and marketing? Why does one salesperson love to interact with people, while the other prefers the paperwork process, or the creativity of marketing the property? In this session you will discover how to recognize your teams' skills and talents and the steps necessary to align sales and marketing. You will also learn why training and professional development is essential. You will walk away with the knowledge on how to select the right training program for your team.

**Focus: Marketing, Philanthropy & PR**

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### ► **How a Pandemic Redefined Telehealth: Planning for and Implementing Telehealth in Senior Communities**

*Joshua Hofmeyer, Senior Care Officer and David Darr, National Director of Sales and Client Relations, Avera eCARE*

Whether you are part of a skilled nursing, long-term care or an assisted living community, we can all agree that COVID-19 has disrupted healthcare and forced facilities to rethink delivery of care along with limiting exposure for their residents and staff. Thanks to advancements in technology and connectivity, the adoption of telehealth within the senior care realm is growing, bringing health care close to home for those who need care most.

**Focus: Technology & Innovation**

### ► **Managing The New Workforce**

*Martha Bryan, Owner, Bryan & Bryan Associates*

Today's workplace is unique. Managers are increasingly grappling with generational differences in their staff. Problems can arise from differing mindsets and communication styles of workers born in different generations. The leadership skills that worked in "old story" organizations will not work with today's employees. This program is about changing the way we lead to harness the energies of a multi generational group of employees to produce high performance outcomes.

**Focus: HR/Workforce; Dining; Leadership & Strategy**

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# PROGRAM ANNOUNCEMENT



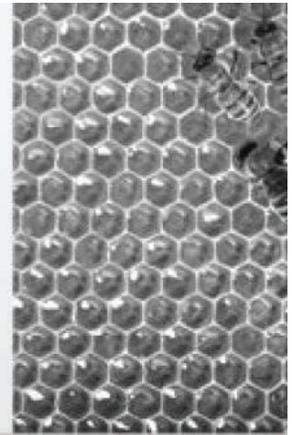
**Is our Membership Directory App downloaded on your mobile devices? It's been six years since we launched. The feedback has been amazing!**

- **The Directory goes where you go** –Whether you are in your office on your desktop, or on the road using your mobile phone, our Member Directory App is just a click away. You can access it from any device that has a browser, and even download it to your device for times when you don't have an internet connection.
- **The Directory is always up-to-date** –Because the Member Directory App is digital, we update and post daily
- **The Directory is easy to navigate** –With the touch of a finger you will be able to cruise through the App and view member communities, top leaders, providers by county and business members by service categories.
- **The Directory connects members to each other** –Want to connect with a leader in the association? Meet up with a former colleague or reconnect with an old acquaintance? Just check the directory! You can download member info as a vCard, print the directory, or save .csv files.
- **The Directory showcases our sponsors and business partners** –We are fortunate to have a network of associate business members that cater to the needs of our community members and support our mission. You can search partners by category – from accountants, architects to medical supplies and staffing – find their key people, and learn more on their websites. Whatever your project or need, be sure to check the directory for an Association partner first!

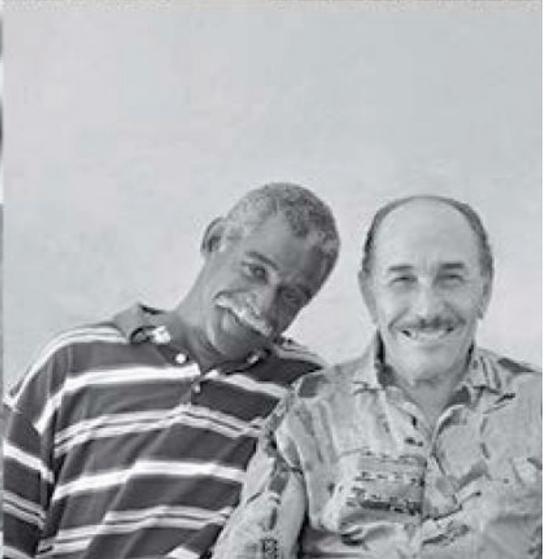
The Member Directory App is a password-protected member benefit. The link is [www.lawadirectory.org](http://www.lawadirectory.org). Once you have logged on – refer to “Getting Started” located in the lower corner of the first page for download instructions to your phone, tablets or desk tops!

For the Member only [access code](mailto:CMeritt@LeadingAgeWA.org) email Cassi at [CMeritt@LeadingAgeWA.org](mailto:CMeritt@LeadingAgeWA.org)!

PROGRAM **SPOTLIGHT**



**Rehab**  
**Pharmacy**  
**Data Analytics**  
**and Consulting**



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## **SESSION 3 - TUES., JUNE 15, 2:30 - 3:30 PM**

### **► Considering a Major Capital Campaign? How to Grow Philanthropic Potential and Raise Capital Funds to Support Your Community (Part 2 of 2)**

*Karen Rotko-Wynn, CFRE, Chief Business Enterprise Officer, The Alford Group* Whether you are seeking to raise additional funds to support major projects & initiatives or to embark on a major capital campaign, there are fundamental pieces of the puzzle that need to be in place. In this two-part session, participants will learn how to prepare for a major fundraising effort, beginning with creating a culture of philanthropy within your internal staff; creating a compelling case for support to articulate your vision; building leadership to identify and cultivate prospective donors; and the importance of a Feasibility Study prior to a major campaign launch. This session will walk attendees through the process from beginning to end, starting with an internal commitment to building external stakeholders and everything in between. There will be opportunities to interact with each other to share ideas and discuss opportunities, challenges and vision around how the campaign will make a difference in the lives of the people within your community – both for your staff and your residents.

**Focus: Fund Development, Marketing, Finance and Leadership**

Sponsored by: **HCMP** Low Offices **Hillis Clark Martin & Peterson P.S.**

### **► Strict Liability for Your Employee's Discrimination – Can You be Held Responsible?**

*Carin Marney, Shareholder, Lane Powell*

Washington law is changing when it comes to claims of discrimination that can be asserted against long term care providers, including claims for crimes committed by your employees. Plaintiffs are pursuing new theories for what constitutes discrimination. This session will cover recent case examples where alleged sexual assault and crimes by an employee is pursued as a discrimination claim; how families are using video and audio equipment to conduct their own surveillance; and what you can do to manage your risk including your policies and procedures for electronic monitoring of residents, background checks and training of your employees, and communications with your families, residents, employees and media.

**Focus: Management & Operations**

### **► Infection Control Lessons Learned From COVID Surface Testing**

*Shula Jaron, CEO, Enviral Tech*

COVID-19 has been on everyone's mind. Over the past year, facilities have standardized and increased protocols. Have you been testing within buildings as a way to gain visibility into the spread of viruses and the effectiveness of our new infection control protocols?

In this presentation, we will discuss the lessons learned from Enviral Tech's testing data, collected from more than 50,000 surfaces across the United States.

Hear examples from hundreds of long term care facilities who have been doing surface testing, along with tips on how to improve infection control for COVID and other infectious diseases.

**Focus: Management & Operations**

## **SESSION 3 - TUES., JUNE 15, 2:30 - 3:30 PM (CONT'D)**

### **►Risks and Trends in Cybersecurity and Fraud**

*Randy Romes, Principal, Clifton Larson Allen*

As organizations mature their cybersecurity hygiene, hardening defenses and refining detection and response, the fraudsters continue to find new ways to ply their trade. Attendees will gain an up to date understanding of current threat landscape through the analysis of case studies and examples for public disclosures. We will examine case study examples of actual spear phishing, account take overs, and ransomware. We will close with strategies to mitigate the risks related to these types of attacks.

**Focus: Technology & Innovation; Management & Operations**

### **►Dining for Health & Dollars: Presenting the Latest Trends and Tastes of the Modern Elder (Part 2 of 2)**

*Mike Peacock, Executive Chef & Culinary Coach; Randi Saeter, MBA, RD, LNHA, Community Coach, Culinary Coach Consulting; Don Warfield, Vice President Sales & Marketing Community Coach, 3rdThird Marketing*

Learn how to create a modern dining experience that goes beyond the institutional approach by utilizing fresh foods, local vendors, innovative recipes and proper techniques. It's time to provide a consistent world-class dining experience that will excite your residents in all levels of care.

**Focus: Financial Management; Dining; Wellness & Life Enrichment; Management & Operations**

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### **►Maximizing Section 8 and PRAC Rental Subsidy**

*Gates Kellett, Principal, The Gates Dunaway Group*

Are you SURE that you are getting the highest Section 8 rents? Are you aware of steps you can take to better preserve your Section 8 rental income? Did you know that PRACs can now be converted to 20-year Section 8 contracts? Learn the latest about how HUD is making it easier for non-profit senior housing owners and managers to maximize and protect your vital rental subsidy!

**Focus: Financial Management; Management & Operations**



**SESSION 3 - TUES., JUNE 15, 2:30 - 3:30 PM (CONT'D)**

**► Put the People Back Into Marketing: How to Truly Connect Person-to-Person, Lower Marketing Expenses, Increase Returns and Heighten Joy**

*Wendy O'Donovan Phillips, CEO, Big Buzz*

- The data dilemmas faced by powerful corporations like Google, Facebook and what it means for your community
- Making the most of voice-of-the-customer data
- Quick UX/UI website fixes for higher engagement

**Focus: Marketing, Sales; Philanthropy & PR; Partnership & Collaboration**



- Outstanding Food and Nutrition Program
- Nursing/Medical Supply Savings
- IT/Telcom Solutions
- Facility Maintenance and Construction Agreements
- Pharmacy Program
- Office and Furniture Offerings
- Employee Discount Program





**Wednesday, June 16th, 8:30 am – 9:30 am**

**John H Cochrane III, President & CEO, HumanGood**

**The Changing Landscape of Senior Living**

2020 was an unprecedented year which brought new challenges and opportunities. The pandemic, climate change and important social issues are continuously changing the marketplace and how we serve our customers and team members. Customer expectations are shifting and it is critical to stay ahead of these important transitions within, and outside of, our industry. HumanGood President and CEO John Cochrane will discuss the impact of these changes on our core business model and what we must do to meet changing consumer demands in 2021 and beyond.

# MEET OUR EXHIBITORS

LIVE EXPO HOURS:

Tuesday, June 15th, 10:45 a.m. 1:00 p.m.

Wednesday, June 16th, 9:30 - 11:30 a.m.

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### **SESSION 4 - WED., JUNE 16, 11:45 AM - 12:45 PM**

#### **► Navigating to a Safer Skilled Nursing Model: What We Learned Post-COVID-19**

*Leslie Moldow, Principal, Perkins Eastman Architects; Susan Ryan, Senior Director, The Green House Project; Charlene Harrington, Professor Emerita of Sociology and Nursing, Department of Social and Behavioral Sciences, School of Nursing at the University of California, San Francisco*

This past year skilled nursing environments were hit hard and COVID exposed many issues that are ripe for change. This session will highlight the short-comings we observed and call for system-wide changes. The presentation will be given from three perspectives: a researcher from UCSF who will share the short-comings of existing SNF environments and present high-level suggested changes; a senior director with the Green House Project who will share a national study on how their alternative facilities out-performed typical SNF options; and an architect who will show examples of new and renovated buildings that implement the lessons of environmental change.

**Focus: Leadership & Strategy**

#### **► Uncover The True Value of Rehab – How To Get the Most Out of Your Rehab Model**

*Jonalyn Brown, Vice President of Operations and Emily Steedman, Area Director, Consonus Healthcare Services*

The senior care industry is tough and resilient, but PDP, COVID-19, and more changes ahead, will certainly rattle the industry and leave company casualties. Cost is under a microscope and the choice to partner with a contract rehab provider or go in-house has been on the minds of many providers. There are many factors at play in this decision including price, efficiency of outcomes, hidden costs and risks. This session will identify processes that allow providers to remain focused on continued success, even in the midst of disruption, and help determine the right fit for rehabilitation services.

**Focus: Financial Management**

#### **► Managing Planned Giving Risk During Uncertain Times to Optimize Benefits**

*William McMorran, Sr. Partner, Green Oak*

Planned giving programs need good guardrails to be successful. Risk management is more important than ever during the current pandemic and the low interest environment. Leadership is now realizing that there are a host of risk management issues to address. Long term issues include inurement, undue influence, environmental and tax concerns, investment risk and fiduciary oversight. CFOs must balance conflicting risk considerations while the development and marketing staffs want to broadly promote gift opportunities. The goal of this session is to present the critical and often easily implemented, tools for effectively managing planned giving risks.

**Focus: Marketing, Philanthropy & PR**

### **SESSION 4 - WED., JUNE 16, 11:45 AM - 12:45 PM (CONT'D)**

#### **►The 10 Keys to Lead Generation: How to Drive Digital Demand and Fill the Funnel**

*Andy Crestodina, Co-Founder / Chief Marketing Officer, Orbit Media Studios*

Imagine your audience in that key moment when they realize they need to get serious. They're ready to start looking. This is the so-called zero moment of truth. What happens next? Who do they ask? What do they search for? What website do they land visit? How does that page make them feel? A lot of little things have to go well before a lead is born. Especially when the decision is about health and home. A hundred little actions have to work together to first attract that visitor, address their concerns, build their trust and trigger action.

In this session, we'll walk through a set of some of the most important aspects of lead generation and answer the frequently asked questions. Once done, each attendee will have a new perspective and actionable takeaways for building a stronger bridge for prospects, gently guiding them from that first moment of truth to the final thank you page.

**Focus: Marketing, Philanthropy & PR**

#### **►Resident's Safety in a Changing World: Create a Resilient Community, Reduce Costs and Be an Agent for Environmental Change**

*Alexis Denton, Associate Principal, Perkins Eastman Architects*

In the past decade seniors have had to flee floods and fires, stay cool in heatwaves, and try to stay safe during a pandemic. Crises like these are likely to increase in the future and, similar to COVID, disproportionately impact seniors. This session will provide concrete strategies for design, construction, and operation of resilient communities that are inherently safer, costs owners less over the life of the building, and can function as a powerful marketing tool to potential residents.

**Focus: Design & Project Management**

#### **►The Vital Role Antibiotic Surveillance Plays in Increased Oversight of Infection Prevention and Control Programs**

*Cheryl Scalzo, Clinical Account Manager, Real Time Medical Systems*

According to the CDC, 40-75% of prescribed antibiotics in SNFS may be unnecessary or inappropriate – causing risk of serious infections, increased adverse drug events/interactions, and antibiotic resistance. Monitoring and tracking antibiotic use is an arduous and painstakingly timely process, but vital to improve outcomes and eliminate needless side effects. Learn how technology can help automate the process and identify early warning signs of infection, highlighting the need for testing to determine the appropriate drug interventions.

**Focus: Care and Services**

**SESSION 4 - WED., JUNE 16, 11:45 AM - 12:45 PM (CONT'D)**

**► People Are Your Greatest Asset: Keys to Recruiting, Retaining, and Cultivating Your Workforce**

*Mark Steranka, Partner, Moss Adams*

Learn how to gain the most out of your greatest asset, your people. This presentation will address various aspects critical to a successful workforce, such as recruiting, retention, development, compensation, and succession.

**Focus: HR/Workforce; Leadership & Strategy**

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**► Succession, Leadership, and Workforce Challenges During and Post COVID**

*James Munn, Principal, Clifton Larson Allen*

Succession, Leadership, and Workforce challenges have never been more at the forefront of our industry. Join our session to help your organization emerge stronger from the COVID pandemic.

**Focus: HR/Workforce; Leadership & Strategy**



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## **SESSION 5 - WED., JUNE 16, 1:00 - 2:00 PM**

### ► **Construction During COVID-19: Guidance for Long-Term Care Facilities**

*Stephen Bacchetti, Director and Marcy Boyd, CPA/Partner, Moss Adams*

While the pandemic has brought many activities to a halt, many construction projects are still underway. If your organization has current construction contracts or is considering a new construction project, join us for a discussion on the risks and opportunities in the current climate. We will cover the current state of construction, address key challenges relevant to capital projects, and provide strategies and services that can help mitigate common project areas of risk with COVID-19 considerations. Proactive measures to reduce uncertainty, mitigate potential losses and legal claims, and control capital project budgets, schedule, and costs will also be discussed.

**Focus: Design & Project Management; Financial Management; Leadership & Strategy; Management & Operations**

### ► **Culinary Revolution- Re-defining the Experience of the Future**

*Moderators: Bob Chappell, Morrison Living & Angus Brown, Morrison Living*

*Panelists: Phillip Dopson, VP of Retail and Design, Morrison Living & Soo Im, Associate Principal, Perkins Eastman*

**Focus: Management & Operations; Environmental**

### ► **Requirements of Participation (RoP) Phase III**

*Kris Mastrangelo, President and CEO, Harmony Healthcare International (HHI)*

This program will enable long term care professionals to provide quality person-centered healthcare through an understanding of changes in regulatory expectations from CMS per Phase III Requirements of Participation (RoP).

**Focus: Care and Services; Leadership & Strategy; Management & Operations**

### ► **Telling Stories That Change The World (Part 1)**

*Steve Moran, Founder, Senior Living Foresight*

*This will be a highly interactive session that will help participants identify stories worth telling and how to tell them. There is an expectation that participants will be willing to develop and tell at least one story. We will also cover the kinds of stories that senior living leaders need to be telling.*

**Focus: Leadership & Strategy**

## **SESSION 5 - WED., JUNE 16, 1:00 - 2:00 PM (CONT'D)**

### **►Using Technology to Deliver Music as Medicine: Addressing Immunity, Isolation and Respiratory Challenges Due to COVID**

*Andy Tubman, Co-Founder and Chief Clinical Officer, Musical Health Technologies aka SingFit*

In this presentation, certified music therapist Andy Tubman will take the audience a musical journey that will reveal the science and technology behind active music making and how it can help providers meet the needs of residents and staff including those with dementia, during and after the COVID pandemic. Audience members will participate and learn how music and technology can elevate therapeutic programming in their communities, while supporting clinical goals including reducing isolation, mobilizing lung fluids, improving respiration and improving immunity.

**Focus: Care and Services; Wellness & Life Enrichment; Technology & Innovation**

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### **►Through My Eyes: A Patient's Perspective on Person-Centered Care**

*Verona Bair, RN, Clinical Reimbursement Specialist and Colleen Oakley, OTR, Clinical Reimbursement Specialist, Functional Pathways*

The COVID crisis has forced healthcare providers to examine different and innovative methods to delivering care across the Post-Acute continuum. For these innovations to be effective, we must ensure the efficiencies we try to create continue to be patient and resident centered. This session provides insights from the patient's perspective of the current landscape of care delivery and allows participants to gain in-depth understanding of how quarantine and isolation have affected patient outcomes. We will examine multiple levels of care delivery and what care providers can do to enhance the patient experience, all while following the pandemic rules and regulations.

**Focus: Care and Services**

### **►Why Wait on the World? Boost Census Now**

*Wendy O'Donovan Phillips, CEO, Big Buzz*

- Focus on the right marketing mix to increase awareness, engagement and sales
- Discover the real secret to overcoming objections from the top of the funnel all the way to agreement
- Master the art of the ask to boost referrals without live events (interactive workshop)

**Focus: Marketing, Sales, Fund Development and Leadership**



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## **SESSION 6 - WED., JUNE 16, 2:15 - 3:15 PM**

### **► How to Develop a Modern Approach to Your Community's Communication Plan**

*Joey Carney, Territory Manager and Amy Johnson, CEO, LifeLoop*

COVID has created unprecedented challenges for those in health care and senior living. Because of this, collaboration and clear, concise communication has never been more important. During this session, Joey will discuss how technologies that facilitate with social connectedness can provide assurance and guidance to staff, residents and families. Based on case studies and research, Joey's discussion will go over the nuances of technology adoption across different levels of care. In addition, the group will discuss the importance of tailoring technology and communication efforts to your specific needs to create solutions that are quick and easy to implement.

**Focus: Wellness & Life Enrichment; Technology & Innovation**

### **► Wellness Design & How Nature Plays a Role**

*Orla Concannon, Founder and Sarah Wells-Ikeda, Program Administrator, Eldergrow*

Orla will walk attendees through the future of senior living wellness programs and design, and demonstrate how nature plays a key role. Orla will be joined by LeadingAge Program Administrator, Sarah Wells-Ikeda. This presentation is essential viewing for anyone looking to innovate their wellness program or looking to bring the outdoors in.

**Focus: Wellness & Life Enrichment**

### **► Gracenotes: The Forward-Facing, Actionable Tool to Boost Meaning, Mattering & Legacy**

*Andrea Driessen, Founder, Gracenotes*

Gracenotes, eulogies for the living, are an ACTION we take to say, "I SEE you. Here's WHY you MATTER..." They express our sincerest thoughts about others,\* while they're still here.\* As a long term care professional, you can use—and teach others to use—Gracenotes to... Tangibly explore one's legacy; Make meaning from the disillusionment of loss; & Readily honor others' ways of being. In this perspective-shifting, fun session, we'll: Explore the many forms Gracenotes can take. We'll discuss overcoming reluctance...take time to write a note. And we'll see why taking this \*possibilities-expanding, forward-looking\* step has profound impacts on everyone.

**Focus: Care and Services; HR/Workforce; Wellness & Life Enrichment; Partnership & Collaboration**

### **► Telling Stories That Change The World (Part 2)**

*Steve Moran, Founder, Senior Living Foresight*

This will be a highly interactive session that will help participants identify stories worth telling and how to tell them. There is an expectation that participants will be willing to develop and tell at least one story. We will also cover the kinds of stories that senior living leaders need to be telling.

**Focus: Leadership & Strategy**

## **SESSION 6 - WED., JUNE 16, 2:15 - 3:15 PM (CONT'D)**

### **►The Longevity Lifestyle - What Residents Will Demand and How To Answer Their Call**

*Kelly O'Connor, Elder Rights and Lifestyle Advocate*

Gone are the days of “little old ladies.” Today’s older adults are embracing a new Longevity Lifestyle that is demanding innovation in all areas of senior living. Lifestyle advocate and consultant Kelly O’Connor brings insight into what today’s older adults want for their elder life and how senior living providers can rethink business practices, care delivery, programming models and more. Kelly’s unique combination of fashion marketing in her early career, senior living as her second career, and elder care consulting as her third urges a provocative conversation about what’s possible for tomorrow’s senior living providers and its residents.

**Focus: Leadership & Strategy; Management & Operations; Marketing, Philanthropy & PR; Technology & Innovation**

### **►Rethinking Care for Older Adults: WHO Guidelines on Community Level Interventions**

*Dr. Kelly Tremblay, PhD, Audiologist, Neuroscientist, Advocate*

You don’t have to be a neuroscientist or gerontologist to understand how to support healthy aging brains and bodies. Join Dr. Kelly Tremblay as she makes this science simple. This session will introduce you to the World Health Organization’s (WHO) Guidelines for Integrated Care for Older People (ICOPE) and how you, as a community stakeholder, can make a difference in six priority areas. Discover how ICOPE takes a community-based approach toward person-centered health and social care to optimize the functional ability of older people.

**Focus: Wellness, Social Workers, Clinical and Leadership**

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### **►Looking Ahead to the Post-COVID Development Landscape**

*Jeremy Southerland, Senior Associate - Senior Planner; Alissa Brandt, Managing Principal - Interior Designer; and Chris Ebert, Principal - Architect, Ankrom Moisan Architects*

What will the Post-COVID development landscape look like? The presentation panel will draw from trends observed across a variety of market types to look at potential new development trends for clues into where the demand for future senior living communities will likely appear. It will look at new tools, strategies and technology resources employed out of necessity during the pandemic that are likely to shape the way services and care are delivered. And finally, it will offer some insights about how these emerging trends can work to meet the demands of the changing market demographics while broadening affordability.

**Focus: Design & Project Management; Leadership & Strategy; Management & Operations**



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**Thursday, June 17th, 8:30 am - 9:30 am**  
**Dr. Randy Ross, CEO, Remarkable, Author**

**Hope Rises - Let Your Life & Leadership Soar**

Regardless of what challenges and obstacles you are facing today, build a better life and a brighter future when you choose to embrace hope over fear. Hope can lead to a happier, healthier and more productive lifestyle. Join us for this closing session where you'll take away practical tips on how you can soar to new heights, enhance relationships and become a more inspirational leader.



## **SESSION 7 - THURS., JUNE 17, 9:45 - 10:45 AM**

### **► Hello Healthcare, Your Prescription is Ready! The Value of Pharmacist-Led Medication Management in the Senior Living Community**

*Karmen Stephens, Vice President of Clinical, Consana; Mark Anderson, Chief Administrative Officer, Eldermark*

We would LOVE to see care providers take away some actionable strategies to implement a pharmacist-led medication management program within their communities! Medication regimens are complicated and reconciliation (especially at move in) is a pain! Why not learn how to maximize your capacity to do what you do best, care for your residents, while you let the medication expert do the heavy lifting - we mean HEAVY, seriously, some of these pills are HUGE!

**Focus: Care and Services; Wellness & Life Enrichment; Technology & Innovation**



### **► Reputation Management: How You Look Online Can Help or Hurt Your Sales Process**

*Connie Parsons, President and COO and Mary Donahue, Marketing Manager, Illuminage*

In today's world, we don't even pop down the street for a burger without checking online reviews, so it's a safe bet that for a decision as big as where to live (or where their parents might live), your prospects and their families will check you out online. Be there, and be strong, with tactics to manage and improve online reviews as well strategies to improve your community's first impression when you appear in search engine results.

**Focus: Marketing, Philanthropy & PR**

### **► Improve Quality Care and Employee Satisfaction Through Lean Tools (5S)**

*Dahlia Mak, Managing Director and Shirl Diaz, Director, Moss Adams*

Staffing turnover is a major challenge for the long-term care sector. Caregivers who are more satisfied with their work environment are less likely to seek employment elsewhere—and are more likely to provide better quality care. Workplace organization helps boost engagement and tap into the creativity of your workforce. Learn how a lean tool called "5S"—Sort, Set in Order, Shine, Standardize, Sustain—creates a process that lays the foundation for workplace organization that can greatly reduce waste and improve performance, engagement, and patient satisfaction.

**Focus: HR/Workforce; Leadership & Strategy; Management & Operations**

## **SESSION 7 - THURS., JUNE 17, 9:45 - 10:45 AM (CONT'D)**

### ► **The Digital/Human Intersection: How to Maximize Your Technology Investment**

*Shirley Nickels, COO and Laura Hastings, Director of Care Services, SafelyYou*

You've heard about technology advances in senior living. But how does technology fit within a comprehensive program? And once you've adopted the technology, how do you maximize these innovations beyond the initial "wow" factor? Join this session to learn answers to these questions and more, with proven artificial intelligence-enabled fall detection and prevention as the case study example. We'll cover how this technology goes beyond just detection and contributes to actual fall reduction and prevention through the timely orchestration of digital and human interactions. You'll learn best practices for adopting, training, and ultimately, elevating programs centered around technology.

**Focus: Care and Services; Technology & Innovation**

### ► **Loss, Grief & Bereavement for Caregivers**

*Bonnie Blachly, Consultant, BLB Nurse Consulting Services*

Death, loss, grief, and bereavement affect our caregivers in various and sometimes devastating ways. Yet, caregivers must "soldier on" caring for the needs of the living. Their grief often goes unnoticed and it can have devastating effects on caregivers and the organization as a whole. This session will explore this phenomenon and offer ways to support caregivers and the organization as they support residents and their families during their "dying time."

**Focus: Care & Services; Clinical**

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### ► **COVID-19 and Infection Control**

*Kris Mastrangelo, President and CEO, Harmony Healthcare International (HHI)*

This program will assist long term care professionals to gain an understanding of how to provide and document stellar infection prevention and control based on policies and procedures reflecting current guidance.

**Focus: Care and Services; Management & Operations**



## **SESSION 7 - THURS., JUNE 17, 9:45 - 10:45 AM (CONT'D)**

### ► **Not Your Parents' Senior Living: Learning from the Latest Trends in Multi-Family Living**

*Wolf Saar, Managing Principal, VIA Architecture*

As a transitioning new generation of seniors enters the market, bringing expectations for innovative and connected housing, interest turns to how design is influenced by the latest market-housing trends. This session is an exploration of this movement experienced first-hand from an urban-focused market, multi-family lens. Attendees will dive into the methods behind our market-sector's evolving trends as applied to independent and assisted senior living: engagement with the surrounding neighborhoods through cafes; meeting venues and locations; co-working spaces; sky lounges; compact units that emphasize amenity spaces; making the most of tight urban sites using below-grade and rooftop spaces, and more!

**Focus: Design & Project Management**

### ► **Strategic Capital Planning: Forward Thinking vs. Crisis Management**

*Doug McMillan, President, zumBrunnen, Inc*

To access capital and to truly plan around mission, providers should have the tools to evaluate their facilities' condition and their financial needs and capacity. Facility assessment methodologies, along with financial strategies to implement capital replacements, repairs, renovations, re-positioning, and expansions will be covered. This session reviews the fundamental questions that executives and board members need answered with the assistance of design and engineering professionals. The session is based on actual case studies of senior living communities for single- and multi-site site providers.

**Focus: Financial Management**

### ► **The Gold Standard in Customer Service**

*Lorrell Filliater, HCA, Senior National Account Manager, The Compliance Store Knowledge and Objectives*

- Identify attitudes and behaviors that create a positive customer experience
- Explain the components of the "Gold Standards" expected of all employees.
- Understand expectations of the employee behavior related to customer service.
- Describe the "Gold Standards"
- Discuss attitudes and behaviors that create a positive customer experience.

Gold Standards are good customer service standards or practices. These standards help us focus on hospitality. This session is a straightforward example of creating everyday opportunities for positive interactions with residents, family members, visitors and with each other using gold standards to establish shared expectations.

**Focus: Leadership, HR, Marketing & Sales**

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## **SESSION 7 - THURS., JUNE 17, 9:45 - 10:45 AM (CONT'D)**

### **► Bridging the Loneliness Gap: Engagement Strategies for Keeping Elders Connected**

*Karen O'Hern, Vice President of Product Management, iN2L*

Loneliness among older adults is nothing new. Nowhere has this been more challenging than in senior living communities, a setting where many didn't realize the extent of the issue until the pandemic highlighted the problem. To evaluate the perceptions of loneliness and the impact of COVID-19, iN2L surveyed three groups—senior living residents, family members who aid in resident decision-making, and senior living community leaders—on their experiences and perspectives. Join iN2L to learn more about this research on the loneliness gap and gain strategies for how to overcome it, leading to greater resident well-being, family satisfaction, and organizational success.

**Focus: Technology**



## **SESSION 8 - THURS., JUNE 17, 11:00 AM - NOON**

### **► Robotic Companion Pets: Combatting Social Isolation During COVID-19 & Beyond**

*Ted Fischer, Co-Founder and CEO, Ageless Innovation*

COVID-19 dramatically changed our world in many ways. Restrictive measures designed to slow the spread of the virus—while appropriate and necessary—had the unintended effect of contributing to and exacerbating social isolation and loneliness—especially among our older, more vulnerable populations. Recognizing this challenge early-on in the pandemic, Senior Care providers quickly developed and implemented a comprehensive, multi-pronged approach to combatting social isolation and loneliness for at risk populations. This session will focus on one tool in that toolbox: Joy for All Companion Pets, and will describe the positive impact these Companion Pets made with individuals and their families.

**Focus: Wellness & Life Enrichment; Technology & Innovation**

### **► From the There and Then to the Here and Now: Lessons Learned During the Pandemic**

*Derek Dunham, Vice President Client Services, Varsity; Lana Peck, Senior Principal, National Investment Centers for Seniors Housing & Care*

NIC and Varsity have held the pulse of senior living professionals throughout the COVID-19 pandemic as they navigated day-to-day changing challenges. We will illustrate the impact of the pandemic on occupancy and sales patterns across the continuum, and dive deep into marketing directors' personal experiences and lessons learned to propel the field from the there and then-- to the here and now. We will highlight quantitative and qualitative data sources covering survey responses and roundtable discussions, focusing on transforming the disruption of the pandemic into sales and marketing innovation, and recommending practical applications through senior living's transition into the new normal.

**Focus: Marketing, Philanthropy & PR**

### **► Planning Out Of Crisis - New Opportunities for Technology, Service Expansion and Diversification**

*Cheryl Goodwin, Chief Strategy Officer; Rebecca Neth Townsend, Projects and Strategy; Scott Motyka, Director Business Development /Technology and Dr. Tana Luger Motyka, Director of Research and Analytics, Covenant Health Network*

COVID-19 has driven all of senior living into unknown territory – as we emerge from the “crisis” there is no “back to normal”. This is good news for leadership as it enables an environment for change – but what essential components need to be in place to make changes, specifically in the areas of technology use and service diversification. This session will discuss the model of shaping an effective vision for these changes which highlight the benefit to organization, energizes leadership and creates confidence for the future. Case studies and examples will be used throughout.

**Focus: Leadership & Strategy**

### **SESSION 8 - THURS., JUNE 17, 11:00 AM - NOON (CONT'D)**

#### **► Fall Champions: Conducting Fall Huddles to Reduce Falls and ER Visits**

Shirley Nickels, COO and Laura Hastings, Director of Care Services, SafelyYou  
Do your communities have a fall champion? If not, they should! Fall champions are key team members in reducing falls and ER visits for your communities, ultimately leading to increased resident safety and decreased costs for communities and families. Join us to learn how fall huddles, led by fall champions, use video review of previously unwitnessed falls to determine root cause of the fall and develop action plans to prevent future falls. We'll discuss the benefits of artificial intelligence enabled cameras to reduce falls, share real life case studies, and review lessons learned that can apply to all communities.

**Focus: Care and Services; Technology & Innovation**

Sponsored by:



#### **► How Virtual Reality is Changing the Way We Train**

*Erin Washington, Co-Founder and Director of Education, Training and Outreach, Embodied Labs*

Find out about the learning science behind embodied training, and how virtual reality is being used to develop cutting edge training programs across multiple industries -- saving companies time and resources, and leading to better satisfaction among employees. In this presentation, attendees will both learn about and experience first-hand the benefits of using immersive training tools in aging care such as strengthening emotional and cultural intelligence, communication and conflict resolution skills, and providing better and more confident person-centered care. You'll "see inside the headset" for yourself, as you embody in virtual reality an older adult living with dementia.

**Focus: Care and Services; HR/Workforce; Technology & Innovation**

#### **► A Guide To Successful Blue Sky Selling & Repositioning: Case Studies & Stats**

*Don Warfield, Vice President Sales & Marketing/Community Coach; Cynthia Thurlow Cruver, Principal and Derek Dujardin, Creative Director, 3rdThird Marketing*

Calling all blue sky thinkers! See national perspectives about the timing of a repositioning as well as the related branding, marketing and operational considerations plus blue-sky selling techniques required for success. Just want to sell some tired inventory? This session is for you too! You'll learn sales and marketing tactics for selling outdated apartments before they're remodeled as well as how to build a wait list.

A professional sales coach and his team share tactical, messaging, creative, programming and operations shifts you can make today to help your organization reach for the sky with their repositioning project.

**Focus: Financial Management; Leadership & Strategy; Management & Operations; Marketing, Philanthropy & PR**

**SESSION 8 - THURS., JUNE 17, 11:00 AM - NOON (CONT'D)**

**► Maximizing Outdoor Spaces – A Win-Win for Senior Communities**

*Dean Kelly, Associate Principal, Architect AIA, Rice Fergus Miller, Architects, Interiors, & Master Planning; Moghan Lyon, Partner, PLA, Lyon Landscape Architects; Matt Murry, President/COO, Panorama*

This educational panel explores the necessity and benefit of outdoor spaces in senior communities, not simply in response to COVID-19 but as a path forward to wellness and active aging for communities of all types. Perspectives from architecture, landscape architecture, and ownership come together in a multi-disciplinary panel that looks at how bringing design & programming from the inside out provides wellness, flexibility, and new opportunities for residents & operators alike.

Case studies large and small will demonstrate how outdoor environments can be leveraged to support both the wellness of residents and staff, and the health of a community's marketability.

**Focus: Design & Project Management; Wellness & Life Enrichment**

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**Thursday, June 17th, 12:15 pm – 1:15 pm**  
**Carol Silver Elliott, Board Chair, LeadingAge,**  
**President & CEO, Jewish Home Family**

**In Forward Motion**

To move forward doesn't mean to push past where we have been. On the contrary, to truly move our organizations forward, we must leverage where we have been to become stronger and smarter. In Forward Motion is a keynote presentation focused on both building on the lessons from the COVID era to help inform change and progress for elder care providers. A blend of messages to motivate and ideas to implement, In Forward Motion is for anyone who works in the field of elder care.

## **SESSION 9 - THURS., JUNE 17TH, 1:30 - 2:30 PM**

### **►One Voice: The Effect of Inter-Team Communication on Quality**

*Teresa Fair-Field, Education Specialist and Kathleen Weissberg, OTD, OTR/L, Education Director, Select Rehabilitation*

While communication within a team can be functional or even successful, an organization is ultimately measured by its ability to project a shared, unified voice across many such teams. Achieving this 'one voice' can be a challenge. Individual breakdowns tend to be resolved by a team's strongest-performing members, but the organization's quality is only as strong as the junctions that occur between teams.

Here, a strong individual performance cannot overcome. This course provides usable skills and insights to begin to bridge your silos and reach the pinnacle of organizational communication: one voice.

**Focus: Management & Operations**

### **►What Older Adults Have Taught Me About Resilience During a Global Pandemic (Part 1)**

*Paul Iarrobino, Founding Director, Our Bold Voices*

Don't reinvent the wheel! This virtual interactive session will include voices of older adult participants from a variety of cohorts. Please join the conversation and get your questions answered in real time.

**Focus: Care and Services; Wellness & Life Enrichment; Partnership & Collaboration; Technology & Innovation**

### **►Adapting Through Adversity: Dining & Support Services Moving FORWARD**

*Russ Kallwick, Regional Safety Coordinator/District Manager, Sodexo*

How communities can Adapt through Adversity in the new reality COVID has created. Adversity has given us opportunity to implement new technologies and service delivery methods to better align with today's senior population and use automation to create efficiency. This includes "lessons learned" that we can implement as standards as we move our communities forward.

**Focus: Leadership & Strategy**

## **SESSION 9 - THURS., JUNE 17TH, 1:30 - 2:30 PM (CONT'D)**

### **►The Vital Role Interim Payment Assessments (IPAs) Have on PDPM Success**

*Jim Shearon, VP Clinical Solutions, Real Time Medical Systems*

As SNFs navigate PDPM, many facilities are still trying to understand the role that Interim Payment Assessments (IPA) play in PDPM reimbursement. Under the final rule, providers are only required to perform two Prospective Payment System (PPS) assessments: on day 5 and upon discharge. However, the Centers for Medicare & Medicaid Services (CMS) states that an “IPA is optional and will be completed when providers determine that the patient has undergone a clinical change that would require a new PPS assessment.”

Which leads to question, are IPAs really optional? And, how and when should facilities be documenting IPAs?

**Focus: Financial Management**

### **►ESL (English as Second Language) Champion**

*Todd Engle, Executive Director and Yazmin Uribe, ELL Champion, Friendsview; Melody Abarca-Millan, Academic Development Faculty, Chemeketa Community College*

Learn about Friendsview's ESL Champion position that hires and trains bilingual caregivers, and acts as a coach/mentor for second language learner employees who desire to grow into caregiver roles. Friendsview is collaborating with Chemeketa Community College to develop and refine a basic healthcare curriculum that Champion/ESL employees can use to advance in healthcare careers. A primary goal of the ESL Champion program is to make materials available to share with LeadingAge members locally and nationally.

**Focus: Care and Services; Wellness & Life Enrichment**

### **►Virtual, In-Person, Over the Phone, By Smoke Signal: Why Human Connection Survives Global Pandemics, Natural Disasters, You Name It and Why What's Important will Never Change**

*Deborah Potter, Vice President of Consulting, SageAge Strategies*

**Focus: Marketing, Philanthropy & PR**



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## **SESSION 10 - THURS., JUNE 17, 2:45 - 3:45 PM**

### ► **Road Map for Successful Communities: Beyond the Pandemic**

*DeAnne Clune, Senior Living Operations Consultant and Brenda Chambers, Senior Living Operations Consultant, Zola Consulting*

Join “community-fixers” Brenda Chambers and DeAnne Clune as they tackle the impact of the pandemic on senior communities. With decades of experience in operations and marketing, they will explore the lessons learned since the pandemic began, summarize the state of senior communities today, and provide practical solutions to move forward to recovery and success.

**Focus: Marketing, Philanthropy & Public Relations**

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### ► **Deconditioning and Reconditioning: Rebounding Post-Pandemic**

*Teresa Fair-Field, Education Specialist and Kathleen Weissberg, OTD, OTR/L, Education Director, Select Rehabilitation*

All environments that serve the residential elder have been under stress to secure the safety of their residents while continuing to provide care. As we move into successive phases of the pandemic, it is critical that leaders and administrators have an eye on the future—in ‘rebounding’ their residents, their staff, and themselves. An essential step is to critically examine their populations for the effects of physical and social/emotional deconditioning and to begin building a plan of action for reconditioning the people, the programs, and the environments that contribute to overall wellness.

**Focus: Care and Services; HR/Workforce; Wellness & Life Enrichment**

### ► **Tips and Strategies on Vision Loss: Helping Seniors to Feel at Home**

*Jeffrey Gerhardstein, Resident Service Coordinator, SHAG Community Life Foundation; Jane Elliott, Orientation and Mobility/Vision Rehabilitation Specialist, The Lighthouse for the Blind*

Does someone you care about have low vision? Do you know someone who has experienced blindness? Do you want to learn more about vision loss and the personal challenges of living with vision loss in a senior community?

If you work in the housing field, this workshop is for you! We aim to tell how residents successfully adapt to vision loss and just how they do it. And we aim to explain how vision rehabilitation helps to develop new skills and restore hope.

**Focus: Care and Services**

## **SESSION 10 - THURS., JUNE 17, 2:45 - 3:45 PM (CONT'D)**

### **►The Future of Financing Senior Living Facilities**

*Christi Jacobsen, Attorney and Brandon Pond, Partner, Hillis Clark Martin & Peterson*

Senior living facilities strive to provide the best care to their residents, including comfortable, safe and modern accommodations. At some point, almost every senior living facility will want or need to undertake renovations, remodeling or brand new construction at its campus(es). This presentation will be an informative discussion on options for financing such projects, focusing on tax-exempt financing and how it is changing (including as a result of COVID), as well as brief discussion on a different financing tool new to Washington -- Commercial Property Assessed Clean Energy and Resiliency (C-PACER) -- and its possible utilization by senior living facilities.

**Focus: Financial Management; Leadership & Strategy**

### **►What Older Adults Have Taught Me About Resilience During a Global Pandemic (Part 2)**

*Paul Iarrobino, Founding Director, Our Bold Voices*

Don't reinvent the wheel! This virtual interactive session will include voices of older adult participants from a variety of cohorts. Please join the conversation and get your questions answered in real time.

**Focus: Care and Services; Wellness & Life Enrichment;  
Partnership & Collaboration; Technology & Innovation**

### **►Confronting Bias Across Your Campus**

*Erika Campbell, Ed.D, MA, LMHC, Care Connector*

Our times are acutely fraught with divisions across social groups. Workplace trainings for understanding bias and promoting equity are now heavily promoted to and through human resource departments across the business world. In life-plan housing models, we work in a larger community that encompasses staff, residents, vendors and guests. In this session, we will discuss how staff training and resident engagement in the topics of bias, equity and inclusion can be a dynamic, collaborative process that benefits the whole community.

**Focus: HR, Social Workers, Leadership and Operations**

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