

# Serve to be Great

LeadingAge Oregon  
Fall Leadership Conference



**October 6-8, 2014**

Hood River Inn, Hood River

*LeadingAge*<sup>™</sup>  
Oregon

# Serve to be Great

The concept of service is one that permeates the field of aging services, the organizations that serve elders, and the leaders charged with steering those organizations forward.

Please join us at the LeadingAge Oregon Fall Leadership Conference as we examine what it means to serve in many of its facets. Our topics include:

- The power of servant leadership and its capacity to transform your organization
- The critical importance for not-for-profit organizations of re-examining how you are serving beyond your organization's "walls" to provide community benefit and justify your not-for-profit tax status
- Skill and knowledge development for not-for-profit board members, entrusted with maintaining their organizations' legacy of service
- How collaboration with like-minded entities can enhance your ability to serve
- Updates on state and national initiatives and trends from business consultants, state agencies and LeadingAge, our

national organization, all partners in service to Oregon's elders

- Strategies to improve your skills and performance as a leader.

## Why attend?

In today's fast-paced and rapidly changing world of aging services, LeadingAge Oregon offers just two opportunities per year when staff and leaders across the continuum can gather together to connect and get back in touch with the world outside of your day-to-day challenges.

Our Fall Leadership Conference gives you the chance to touch bases with other Oregon aging services providers from all settings to share strategies for meeting the unique challenges in our state.

Who are the leaders – and the leaders-to-be – in your organization? Be sure to share this brochure with your boards of directors and with the staff leaders who are helping to shape the future of your organizations!

*Special thanks to our Principal Sponsor McKesson!*

## Monday October 6

**5:00-6:30 p.m.**  
**Leadership Academy  
Reception**

This special reception is designed to give Leadership Academy alumni, this year's graduating class and our incoming class the opportunity to meet and reconnect with colleagues and friends.

**6:00-7:30 p.m.**  
**Welcome Reception**

Start making the connections that count! Join us to meet with your peers from other organizations at the Hood River Inn before the conference begins.

*Sponsored by USI Northwest*

## Tuesday October 7

**7:30-8:30 a.m.**  
**Breakfast and  
Networking**

The opportunity to meet and share information with leaders from other senior care and housing organizations across the state is one of the most valuable benefits of conferences like this. If you aren't staying over on Monday night, you'll want to be sure to get to the Hood River Inn early to enjoy a hearty breakfast and great conversation.

**8:30-9:45 a.m.**  
**Keynote**

**Serve to Be Great: Leadership Lessons from a Prison, a Monastery and a Boardroom**

In this inspiring yet content-rich program, **Matt Tenney** introduces the power of servant leadership through his story of

spending 5.5 years confined to military prison for arranging an unauthorized delivery of government funds, learning to be happy with nothing, living like a monk for over 3 years, and discovering the power of a life devoted to serving others.

Matt will show you how to improve your capacity for servant leadership, and how that shift results in greater success as a leader

as well as greater happiness. Drawing on insights from his experiences as a prisoner, monk, and social entrepreneur, as well as from some of the best workplace cultures in the world, you'll walk away with powerful ideas and tools for developing the leadership skills that result in highly engaged, highly innovative, highly successful teams.



After attending this program, you will gain proven tools to help you:

- Attract and retain highly talented people
- Increase the engagement levels of team members
- Create a team culture that delivers world-class customer service
- Create a team culture that is highly conducive to innovation

#### **About Matt Tenney**

Matt Tenney is the author of *Serve to Be Great: Leadership Lessons from a Prison, a Monastery, and a Board Room*. He is also an international keynote speaker, a trainer, and a consultant with the prestigious Perth Leadership Institute, whose clients include numerous Fortune 500 companies. He works with companies, associations, universities, and non-profits to develop highly effective leaders who achieve lasting success by focusing on serving and inspiring greatness in the people around them.

Matt envisions a world where the vast majority of people realize that effectively serving others is the key to true greatness. When he's not traveling for speaking engagements, he can often be found in Nashville, TN.

## **10:00-11:00 Breakouts**

### **A1) Hot Topics in Senior Living**

There is no question that in a field as rapidly-evolving as aging services, leaders must stay informed about what's happening in the world outside their organizations, and the implications for their work here in Oregon. This session will cover hot trends of the next year in the aging services industry – marketing, occupancy, development, technology integration, construction, redevelopment and finance among others.

- Learn how successful senior living organizations in Oregon and nationally are growing their businesses and increasing their “footprints” in their markets.
- Gain strategies for improving operations and occupancy.
- Find out where capital is flowing and how you can access the dollars you need to implement your strategic plan.

*Presenters: Mary Munoz, Managing Director, and Sarkis Garabedian, Senior Vice President, Ziegler*

### **A2) Board Governance Track Reframing the Work of Nonprofit Boards Part I**

Shifting demographic realities, regulatory changes and consumer expectations have caused nonprofit boards to adopt a new and more practical framework to govern more effectively.

Leading Age, Ziegler and BoardSource have completed research regarding trends and best practices in the board rooms of our national nonprofit organizations. What do these emerging trends mean for your organization? Topics will include:

- Broad trends in NFP governance
- Standards of good governance
- Report card for 10 basic board responsibilities
- Board and management roles
- Approaches to governance - models
- Promising practices
- Agendas and time as tools
- Executive reports
- Dashboard reports

*Presenter: Dennis Russell, Senior Vice President - MHS Alliance and President & CEO - MHS Consulting*

### **A3) Leadership Track The Ultimate Leadership Habit: How Mindfulness Improves Performance, Profitability and Well-Being**

Mindfulness training is now being offered by numerous, highly successful companies such as Google, Facebook, General Mills, Apple, Deutsche Bank, Intel and many others. In this highly interactive program, you'll find out why.

This program focuses on the inner work that results in being much more effective as a leader. You'll learn how the simple practice of mindfulness can help you:

- Improve performance at work and as a leader
- Improve people skills / emotional intelligence
- Improve decision making
- Increase your resilience to stressful situations
- Enjoy your life more both at work and at home
- Improve overall well-being
- Make a significant, positive impact on the world

You'll also be guided through simple practices that can help you realize the benefits above and that you can easily

integrate into your daily life at work and at home. Thus, you'll not only have the confidence that you can apply these tools in your life; you'll leave the session feeling as though you just had a mini-vacation.

*Presenter: Matt Tenney*

## **11:15-12:15 Breakouts**

### **B1) Collaborating to Serve: An Update on the Housing with Services Project**

Over the past several years, LeadingAge Oregon member Cedar Sinai Park has led a consortium of public/private organizations to develop the Housing with Services Project, which involves several affordable senior housing properties in Portland and a new health and social services clinic. This pilot project will provide needed health and social services for residents of the affordable housing properties to reduce health care costs, increase resident involvement in their health care decisions, and improve health outcomes. As collaborative efforts are becoming more commonplace and encouraged in an era of coordinated care and multi-faceted aging services, this innovative project may offer lessons for a wide range of senior care and housing providers. In this session, participants will have the opportunity to:

- Hear the status of the project since the launch of its service component
- Examine challenges, opportunities and “lessons learned” posed by a collaborative effort involving a number of public and private partners
- Consider implications of this collaborative effort for providers across the continuum

*Panelists: Howard Klink, Housing & Services Consultant, Cedar Sinai Park; other partners TBA*

### **B2) Board Governance Track Reframing the Work of Nonprofit Boards Part 2: Problem Boards or Board Problems?**

Board member frustration leading to the labeling of a board as a rubber-stamp board, micromanaging board, compliant board or letterhead board are all too common. What lessons can we learn

from others? Using actual case-studies from nonprofit organizations in the senior housing and healthcare sector, participants will dissect the scenarios and determine the role of the board, community and management in solving the strategic, operational and moral challenges presented in the case-studies.

*Presenter: Dennis Russell, Senior Vice President - MHS Alliance and President & CEO - MHS Consulting*

### **B3) Are Sunnier Days Ahead or is the Forecast Still Cloudy? Oregon economic trends and implications for aging services**

As Oregon slowly pulls itself out of the economic abyss that clobbered our beloved state more than many others, it's a good time to pause and examine what the future might hold. What do economic and demographic trends look like for Oregon, and what does that mean for senior care and housing providers? How might these trends impact demand for affordable housing and other aging services, the ability of older adults to move to retirement settings, staff recruitment and retention, our state budget outlook? One of your roles as aging services leaders is to keep your finger on the pulse of what is going on at a local level and consider the implications for your organization and the elders you serve. Please join us to take a peek into the crystal ball and anticipate what these economic and demographic trends will mean for LeadingAge members individually and collectively.

*Presenter: Michael Wilkerson, Ph.D., Senior Economist, ECONorthwest*

### **B4) Leadership Track The Ultimate Leadership Habit: How Mindfulness Improves Performance, Profitability and Well-Being**

Please see description for session A3. This session is a **repeat** of the 10:00 a.m. session.

*Presenter: Matt Tenney*

## **12:15-1:45 Leadership Luncheon**

Join us to applaud the LeadingAge Oregon Leadership Academy Class of 2013-2014 as they conclude their year of learning about leadership and the aging services field, and welcome our in-coming Class of 2014-2015!

*Sponsored by Orrick, Herrington & Sutcliffe*

## **2:00-3:00 Breakouts**

**C1) Dialogue with APD: Current projects and a look ahead to 2015**  
Oregon's Aging and People with Disabilities division is busy with a wide variety of initiatives and projects, all ultimately designed to improve the quality of services available to support Oregon's elders. In this session you will hear from APD leadership on the status of these initiatives and will have the opportunity to discuss how these activities impact the work that you do. Come learn about:

- The workgroup developing a plan to improve and strengthen Oregon's public long-term services and supports system
- The status of the Nursing Facility Reduction Initiative, which aims to reduce excess nursing facility capacity by eliminating 1,500 beds statewide by the end of 2015
- How the state will be spending its Quality Fund dollars
- Plans for a new consumer website with information about Oregon's assisted living and residential care facilities
- Continuing work to strengthen Oregon's approach to elder abuse and neglect
- APD's legislative priorities for the full 2015 Legislative session

*Guest/Presenter: Mike McCormick, Director, Aging and People with Disabilities*

### **C2) Board Governance Track Ready or Not, You Likely Have a Leadership Transition in Your Future**

It is estimated that 62% of Leading Age members will experience a leadership transition in the next five to seven years. The ripple effect of those planned and unplanned transitions can create chaos

for organizations that have not prepared in advance. Understand how leaders and their organizations strategically develop plans for transitioning both into and out of leadership roles. Learn effective strategies for managing leadership transitions in a way that minimizes fear, assures a proper focus on maintaining effective operations, and assists the new leader to assimilate quickly into the new role.

- Inform and educate board members and executive leaders about the executive transition process
- Identify strategies and processes needed to prepare for both unplanned and planned transitions in advance
- Increase your awareness of your roles and responsibilities as board members and organizational leaders
- Provide resources for participants to take back to their respective organizations to help prepare for executive transition
- Discuss the pluses and minuses of using consultants or search firms vs. in-house managed process

*Presenter: Dennis Russell, Senior Vice President - MHS Alliance and President & CEO - MHS Consulting*

### **C3) Leadership Track Authentic Collaboration: Advocacy and Inquiry**

Most of what passes as collaboration in our organizations is not collaboration at all but mere political correctness. As a result, we make decisions that have not been refined by the process of iron sharpening iron, but rather are the result of avoidance and accommodation. Authentic collaboration, however, is a robust approach to conversation that welcomes dialogue, discussion, and even debate where people are able to hear and be heard.

In this workshop you will learn:

- How to break the unproductive cycle of pursue-withdraw-pursue-withdraw
- How to express your point of view clearly and confidently
- How to examine others' point of view without being defensive or argumentative
- How to make better decisions by engaging in better discussions

*Presenter: Bill Zipp, President, Leadership Link, Inc.*

## 3:15-4:15 p.m. Breakouts

### D1) Advocates Serving Oregon's Elders: Understanding and Working with the Oregon Long-Term Care Ombudsman's Office

In recent years the Oregon Long-Term Care Ombudsman's Office has raised its profile, playing a more visible role in various initiatives, task forces and committees that address issues related to quality of life for Oregon's elders. Come meet the ombudsman leadership and take a fresh look at the role of the ombudsman in serving your residents. This session will explain the role of the Long-Term Care Ombudsman, the office's organizational structure, their access authority, standard complaint procedure, suggestions on when to ask for assistance from the office, top 10 complaints received by the Long-Term Care Ombudsman's Office, and common myths about the program. In addition, you will hear suggestions about ways your community can create a collaborative relationship with the Ombudsman program.

*Presenters/guests: Ana Potter, Deputy State Long-Term Care Ombudsman; Mary Jaeger, Oregon Long-Term Care Ombudsman*

### D2) Board Governance Track Why I Stunk as Board Chair - and What I Did Right!

Our board chair was suddenly called away to Iraq. We had no leader, no process for selected a successor, and the CEO's performance evaluation was past due. This is the beginning of my stint as board chair for The Hearthstone, a LeadingAge member CCRC located in Seattle. This was the first board I had ever been on and I had zero experience as board chair. In this presentation we'll discuss the lessons I learned during my two years in this key governance role. We'll talk about topics such as board portals on your website, succession planning, CEO/chair relationships, setting the agenda and trying to actually follow it, evaluating the CEO, planning a retreat, selecting officers, board governance policies, and board self-evaluations.

- Examine best practices in governance - and what not to do
- Learn from the Hearthstone's efforts to develop a board succession plan and come away with samples to use.
- Better understand the role of the board chair

*Presenter: Mitch Hansen, CPA, Shareholder, Clark Nuber P.S.; Past Chair, The Hearthstone Living at Green Lake*

### D3) Strategies for Addressing the Top 10 Risk Management Issues in Senior Living

Like it or not, a key responsibility for senior living leaders is balancing the needs and desires of the residents you serve on the one hand, and managing your organization's risk on the other. How do you deal with the apartment resident who is beginning to become forgetful and leaves pots on the stove, the family threatening a lawsuit because Mom fell in the bathroom, the increasing acuity in your assisted living setting? In this session, you will learn the top risk management issues facing senior living communities. You will also hear how simple steps can be taken to minimize your exposure to these risks.

- Identify the leading causes of professional and general liability claims
- Understand how managing expectations and customer service impacts the likelihood of an incident becoming a claim
- Take actions to reduce your organization's exposure to liability lawsuits

*Presenter: Tom Strong, Loss Control Manager, GuideOne Insurance*

## 4:30-6:30 p.m. Exhibit Reception

Please join us to thank the Business Members whose support is critical to LeadingAge Oregon educational programs such as this conference. Enjoy hors d'oeuvres and learn about new and improved products and services that are available to help you provide the highest quality care and services to your residents and clients.

# Wednesday October 8

## 8:00-9:00 a.m. Breakfast and Networking

Don't miss the opportunity to reconnect with your peers to discuss the opportunities and ideas generated by the first day's conference sessions!

## 9:00-10:30 a.m. General Session

### Social Accountability and Community Engagement: Affirming Your Charitable Mission and Protecting Your Not-for-Profit Tax Status

Don't look now, but your not-for-profit tax status is under a magnifying glass. Nationally and right here in Oregon, elected officials and other interested stakeholders are examining the value of tax exemptions as they look under every rock for revenue to bolster tightening public budgets. The heightened scrutiny has prompted our national association, LeadingAge, to embark on a special campaign to educate each and every not-for-profit member about the critical importance of establishing and documenting a robust social accountability program.

If your organization values its not-for-profit heritage - not to mention the tax-exemptions and access to charitable donations and tax-exempt bond financing - you won't want to miss this session, likely the most important program you will attend this year. Can you clearly articulate what you do that is different from the proprietary senior care or housing provider down the street? Have you documented the ways that you benefit your surrounding community beyond your day-to-day operations? Have you budgeted dollars for your charitable mission?

Please join us as we:

- Examine current events and trends as they relate to not-for-profit tax exemptions and social accountability programs
- Gain strategies for identifying community needs and integrating them into your social accountability program
- Learn how to document and report your community engagement activities to safeguard your tax-exempt status

**Who should attend:** Living your not-for-profit mission is a company-wide responsibility; all of your staff should understand what social accountability is and their role in fulfilling your social accountability commitment. We strongly encourage attendance by all senior leaders, board members and other key staff who can help to educate colleagues about this important topic.

*Presenters: Nikki Rineer, President, Holleran; Cory Kallheim, VP, Legal Affairs and Social Accountability, LeadingAge*

## 10:45-Noon General Session

### Update from D.C.: Critical Issues Facing Aging Services

Congress appears to be at a stalemate on most issues, mid-term elections are looming, and would-be Presidential candidates are testing the waters for 2016. So what does any of that have to do with your work on behalf of elders in Oregon? As it turns out, plenty. Decisions or lack of decisions made in our nation's capitol have a significant impact on Oregon's aging services providers and the residents and clients they serve. We encourage you to join us for this important, once-a-year opportunity to hear directly from LeadingAge staff about our national association's public policy priorities and the national legislation and activities that have repercussions for the work that you do here in Oregon.

*Presenter: Barbara Gay, Director of Governmental Affairs, LeadingAge*

# Schedule at a Glance

## Monday October 6

5:00-6:30 **Leadership Academy Reception**

6:00-7:30 **Welcome Reception**

## Tuesday October 7

7:30-8:30 **Breakfast/Networking**

8:30-9:45 **Keynote**

*Serve to be Great: Leadership Lessons from a Prison, a Monastery and a Boardroom*

10:00-11:00 **Breakouts**

A1) *Hot Topics in Senior Living*

A2) *Board Governance Track: Reframing the Work of Nonprofit Boards Part I*

A3) *Leadership Track: The Ultimate Leadership Habit - How Mindfulness Improves Performance, Profitability and Well-being*

11:15-12:15 **Breakouts**

B1) *Collaborating to Serve: An Update on the Housing with Services Project*

B2) *Board Governance Track: Reframing the Work of Nonprofit Boards Part II: Problem Boards or Board Problems?*

B3) *Are Sunnier Days Ahead or is the Forecast Still Cloudy? Oregon economic trends and implications for aging services*

B4) *Leadership Track: The Ultimate Leadership Habit - How Mindfulness Improves Performance, Profitability and Well-being (repeated)*

12:15-1:45 **Lunch**

*Leadership Luncheon*

2:00-3:00 **Breakouts**

C1) *Dialogue with APD: Current projects and a look ahead to 2015*

C2) *Board Governance Track: Ready or Not, You Likely Have a Leadership Transition in Your Future*

C3) *Leadership Track: Authentic Collaboration: Advocacy and Inquiry*

3:15-4:15 **Breakouts**

D1) *Advocates Serving Oregon's Elders: Understanding and working with the Oregon Long-Term Care Ombudsman's Office*

D2) *Board Governance Track: Why I Stunk as Board Chair - and What I Did Right!*

D3) *Strategies for Addressing the Top 10 Risk Management Issues in Senior Living*

4:30-6:30 **Exhibit Reception**

## Wednesday October 8

8:00-9:00 **Breakfast/Networking**

9:00-10:30 **General Session**

*Social Accountability and Community Engagement: Affirming Your Charitable Mission and Protecting your Not-for-Profit Tax Status*

10:45-Noon **General Session**

*Update from D.C.: Critical Issues Facing Aging Services*

Noon **Adjourn**

# Registration Details

## *Special thanks to Online Registration Sponsor Ziegler*

All registration is online. You will have the option of paying for your online registration by check or by credit card. (LeadingAge Oregon accepts Visa, Mastercard and American Express).

To register, go to the LeadingAge Oregon home page, [www.leadingageoregon.org](http://www.leadingageoregon.org), and click on the Fall Conference Brochure and Registration Information link.

### **Provider member registration:**

Each facility/organization must register independently, even when several facilities/organizations are governed by a parent company. Discounts are offered for fourth and subsequent registrants from the same facility/organization.

### **Business Associate registration:**

LeadingAge Oregon welcomes our Business Associates who wish to attend the conference to benefit from the education and networking opportunities. The exhibit at this Fall Leadership Conference is sold out, but sponsorships remain available; please contact Karen Nichols, [knichols@leadingageoregon.org](mailto:knichols@leadingageoregon.org), 503.684.3788 for more information.

For Business Associate members who wish to attend the conference as an attendee, two Business Associate rates are available. One rate is for Business Associates who have chosen a sponsorship with a value of \$500 or more, and another rate is for those who are not exhibitors or sponsors.

### **Cancellations:**

Cancellations must be sent in writing to Denise Wetzel, [dwetzel@leadingageoregon.org](mailto:dwetzel@leadingageoregon.org), no later than **Wednesday, September 24** to be refunded (less a \$25 service charge). No refunds are possible after that date, but you are welcome to send someone in your place.

### **Early bird rates:**

Early bird rates are available through **September 24** only. **All registration fees increase by \$25 after September 24.**

<b>Conference fees:</b>	<b>LeadingAge Oregon members</b>	<b>Non-members</b>
<b>Provider members:</b>		
<b>First three staff registrants*:</b>	\$335 each	\$435 each
<b>Fourth and subsequent staff registrants from same site:</b>	\$235 each	\$335 each
<i>*Staff registrants include CEOs/Administrators, department managers and any other paid employees of a participating organization.</i>		
<b>Nonprofit board members:</b>		
Full Conference	\$125	\$175
Tuesday only*	\$100	\$150
<i>*Special one-day rate is available to nonprofit board members only</i>		
<b>Business Associate members:</b>		
Per person sponsor fee (Non-exhibiting)	\$335	N/A
Per person Non-Exhibitor/Non-Sponsor	\$535	N/A
<b>Spouse/guest:</b>	\$50	
<i>Spouse/guest fee includes Monday welcome reception and Tuesday exhibit reception</i>		

## Location

**The Hood River Inn** is located at 1108 East Marina Way in Hood River, approximately 45 minutes east of the Portland airport.

### **Room rates:**

Single/Double Standard: \$99  
Single/Double River: \$114

*Extra person rate: \$15 plus tax*

*Rates do not include applicable taxes.*

Participants must make their own room reservations by calling 541.386.2200 or 1.800.828-7873. Be sure to mention that you are with the LeadingAge Oregon conference. After **September 15** our room block will be released to the general public, so be sure to reserve your room by that date!

## Cancellation Policy

Cancellations received in writing by **September 24** will be refunded less a \$25 administrative fee. No refunds are possible after that date; however, you are welcome to send someone in your place.

## CEUs

Certificates will be provided for up to 8 CEUs.

## Special needs

If you have a disability that may impact your participation in this conference, please include with your registration a statement regarding your dietary or disability needs. Someone from our staff will contact you prior to the conference to discuss accommodations. We cannot assure the availability of special meals or appropriate accommodations without prior notification.

## Scholarships

A limited number of scholarships are available for those LeadingAge Oregon members who would otherwise not be able to pay registration fees. Call 503.684.3788 for more information.

**Questions?**  
**Call 503.684.3788**

LeadingAge Oregon would like to thank the following organizations for their sponsorship of our Fall Leadership Conference:

## *Principal Sponsor*



## *Welcome Wine and Cheese Reception*



## *Leadership Luncheon*



## *Supporting Sponsor*



## *On-line Registration Sponsor*



Interested in a sponsorship? Contact Karen Nichols at [knichols@leadingageoregon.org](mailto:knichols@leadingageoregon.org), 503.684.3788