



**Power of Purpose**

**2017 Fall Leadership Conference**

Agate Beach Inn

Newport, Oregon

October 11 – October 13, 2017



**LeadingAge®**  
Oregon

**LeadingAge Oregon Fall Leadership Conference  
Special Track for Boards of Directors**

**Thursday, October 12, 2017**

**Agate Beach Inn, Newport**

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

**8:30-1:00: Keynote: Who Will Care for Us? Strategies to Address the Workforce Crisis**

There's no magic technology or solution to the workforce crisis in aging services. Certainly demographics are not in our favor: It is projected that by 2030 the nation will need 2.5 million long-term services and supports (LTSS) workers to meet the needs of a rapidly growing older population. Yet more workers are currently leaving the senior care and housing sector than are entering it.

At the same time, recruitment and retention are challenging because workers are not immediately attracted to aging services due to societal ageism, negative perceptions of long-term care workplaces, and inadequate financial incentives (compensation and career-paths). To attract and retain capable people, we have to remember that we are workplaces and employers. Providers that are successful in this endeavor have high quality supervisors, perceptually more attractive jobs, and respect for the organization – all key factors for employee recruitment and retention.

In this session, Dr. Robyn Stone will discuss strategies to help aging services stakeholders, as well as our individual organizations, address the workforce crisis now - and in the even more challenging years ahead.

Participants will:

- Identify the true factors relating to workforce recruitment and retention and their impact on the field and your organization.
- Understand long-term trends impacting the workplace (workers, residents, and families) in the United States.
- Determine strategies and best practices for alleviating the workforce crisis within the field and your organization.

**Presenter:** *Robyn Stone, Dr.P.H., Senior Vice President for Research, LeadingAge, and Co-Director of the LeadingAge LTSS Center @ UMass Boston.*

**10:15-11:30: Board Track: The Role of Residents in Governance**

As Baby Boomer residents arrive at LeadingAge Oregon member communities with more interest in active participation in many areas of community operations, it seems to be a good time to explore current practices related to residents as board members. One category of member (Oregon-registered Continuing Care Retirement Communities) must allow at least one non-voting resident on their boards, but that is a minimum requirement. On the other side of the spectrum, LeadingAge Oregon member Terwilliger Plaza is one of a handful of self-governing retirement communities in the nation, where most of their board members are community residents.

In this session, we'll examine current practices related to residents and governance, where trends may be heading, and what we can learn from Terwilliger Plaza's experience.

**Facilitator:** *Bob Johnson, Interim Executive Director, Terwilliger Plaza*

**Panelists:** *Clif Droke, Board Chair, Terwilliger Plaza; Brian Young, Executive Director, Cascade Manor; David Lewis, Executive Director, Capital Manor; Vassar Byrd, CEO, Rose Villa*

### **11:30-1:00: Leadership Luncheon**

### **1:15-2:30: Board Track: Doing the Right Thing - Fiduciary Responsibilities of Nonprofit Board Members**

The board of a nonprofit organization has the ultimate responsibility and accountability for the organization's actions. As stewards of this public trust, board members have a fiduciary duty to always act for the good of the nonprofit and exercise reasonable care in all decision-making without placing the organization under unnecessary risk. In this session, participants will review a board member's fiduciary duties and examine best practices for fulfilling this fiduciary role. Governance pitfalls and challenges will be explored, with a particular focus on such issues as conflicts of interest and confidentiality. The goal of this session will be to familiarize board members and nonprofit leadership staff with these obligations and concerns so they may identify them in real-world situations and mitigate associated risks.

**Presenter:** *Brian DeFoe, Shareholder, Lane Powell PC, Seattle, WA*

### **2:45-4:00 Board Track: Turning Vision into Action: Building a Culture of Philanthropy**

Nonprofit organizations play a special role in our culture, with particular obligations - and some special benefits. One of those benefits is the opportunity to raise funds through charitable contributions. Is your organization taking full advantage of this potential revenue stream? Does your approach to philanthropy engage all stakeholders, or is it a job that's assigned to a few? Examine how philanthropy can become a part of your strategic plan/strategic initiatives through a donor-centric development program.

In this fast-paced, fun session you will learn:

- How to articulate the ways philanthropy will impact your organization.
- What elements must be in place to successfully create a culture of philanthropy that can make a real impact on your organization and its resources.
- The role of the board in establishing and maintaining a culture of philanthropy.

**Presenters:** *Randa Cleaves Abramson and Jonathan Abramson, avenue2possibilities, LLC*

### **5:30-7:00 Exhibit Reception**

Join us if you're able! Our exhibitors will exhibit new and improved products and services that are available to help LeadingAge Oregon members provide the highest quality care and services for residents and clients.

***Board members are welcome and encouraged  
to attend the following sessions on Friday, October 13 as full attendees:***

#### **The View from D.C. Post-Election: Implications for Aging Services**

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

#### **Beyond Resilience: Trench-Tested Tools to Thrive Under Pressure**

**Presenter:** *Dan Diamond, M.D.*

**Register online at [www.leadingageoregon.org](http://www.leadingageoregon.org)**

# LeadingAge Oregon Fall Leadership Conference Keynote and Board Track Speakers

## Robyn Stone

Robyn I. Stone, Dr.P.H, a noted researcher and internationally recognized authority on long-term care and aging policy, is Sr. VP for Research at LeadingAge and Co-Director of the LeadingAge LTSS Center @ UMass Boston. She has held senior research and policy positions in both the U.S. government and the private sector. She was a political appointee in the Clinton Administration, serving in the U.S. Department of Health and Human Services as Deputy Assistant Secretary for Disability, Aging and Long-term Care Policy and Assistant Secretary for Aging. Dr. Stone is a distinguished speaker and has been published widely in the areas of long-term care policy and quality, chronic care for the disabled, aging services workforce development, low income senior housing and family caregiving. She serves on numerous provider and non-profit boards that focus on aging issues. Dr. Stone is a fellow of the Gerontological Society of America and the National Academy of Social Insurance. She was elected to the National Academy of Medicine (formerly the Institute of Medicine) in 2014.



## Brian DeFoe



Brian DeFoe is a business lawyer at Lane Powell. He assists clients in customer-facing industries on matters of business formation, governance and finance, and regulatory compliance. Brian frequently provides guidance to entrepreneurs and companies with respect to entity selection, formation and capitalization, as well as current best practices in corporate governance. In the course of advising clients on corporate governance, Brian is regularly called on to assist in internal investigations of alleged wrongdoing and to advise Boards of Directors with respect to such concerns. Brian has extensive experience advising clients of all sizes in connection with capital-raising transactions, including public and private securities offerings conducted in compliance with federal and state securities laws, and the entry into credit facilities with clients banking partners.

## Randa Cleaves Abramson and Jonathan Abramson

Partners Randa Cleaves Abramson and Jonathan Abramson have experience in fund development for a wide range of agencies spanning over a combined 50+ years. They have worked ‘on all sides of the table’ with nonprofits as staff, board committee member, volunteer and counsel. Services provided by their company, avenue2possibilities LLC, include conducting feasibility studies, providing capital campaign counsel and strategic direction, and creating successful fundraising programs with organizations in the arts, education, environment, health care, and human services. They are currently working with Willamette View, Inc. in Portland.



Over the years, Randa and Jonathan have been called upon to speak at nonprofit conferences in the United States, Canada, and Singapore on the art and science of fundraising strategies as well as on their work creating high performing development teams.