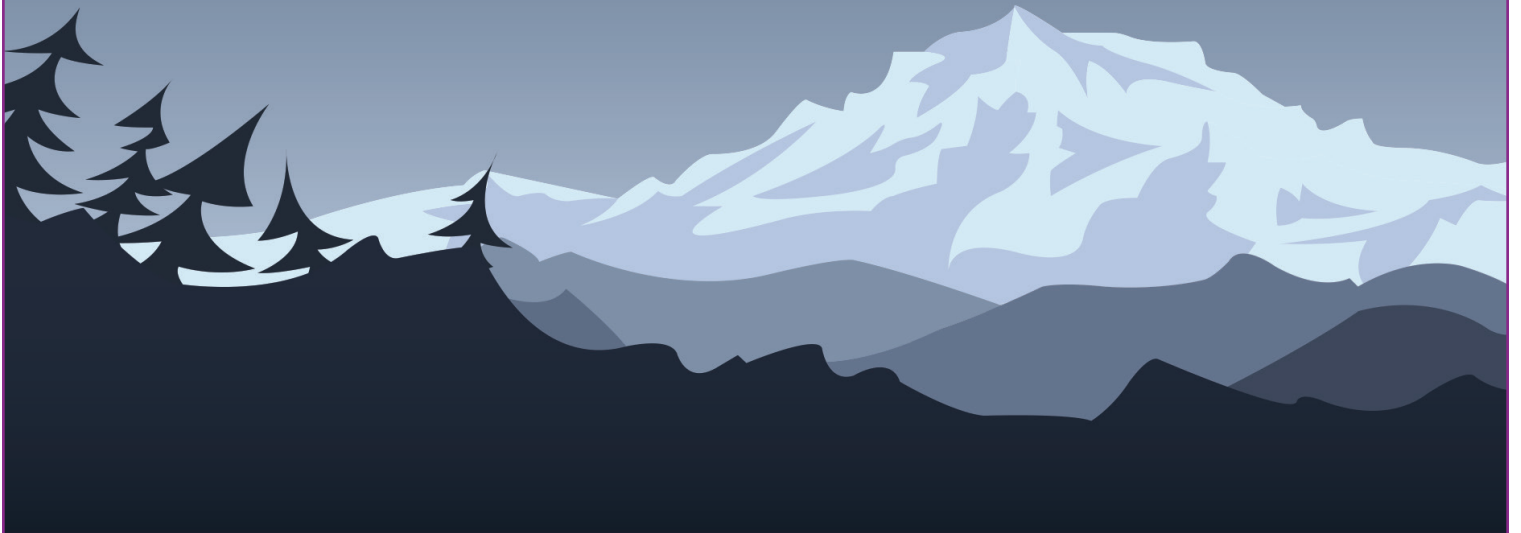


Life on Purpose



LeadingAge[™]
Oregon

2018 Fall Leadership Conference

Hood River Inn

Hood River, Oregon

September 26-28, 2018

Leading... with Purpose

As fall approaches, it is once again the time of year when we invite LeadingAge Oregon leaders and board members to gather together to touch bases on our current challenges and opportunities and make the most of what we have to offer each other in this era of great change and possibilities: information, shared learning and support.

You won't want to miss this year's Fall Leadership Conference, September 26-28, 2018 at the Hood River Inn!

Among the highlights:

- A **keynote** by **John Cochrane**, President and CEO of HumanGood who will examine where we are and where we are going in the future
- A **board track** that will explore **board and staff relationships**, creating a culture of **philanthropy**, navigating **change**, and planning effective **strategic planning retreats**
- Important updates on **trends** and **upcoming state initiatives** from Aging and People with Disabilities staff
- Innovative approaches to **workforce development**, **media relations**, **proposed SNF Medicare payment model**, **roundtables** and **more!**
- In the midst of so many **workforce challenges**, hear a dynamic closing session focused on having a team of **purpose-driven employees**

Wednesday September 26

Leadership Academy Reception at Marchise Winery

5:30-6:30 p.m.

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.

Welcoming Reception at Marchise Winery

6:00-7:30 p.m.

Start making the connections that count! Join us at **Marchise Vineyard and Winery** (just 5 miles from Hood River Inn), before the conference begins.

Sponsored by USI Northwest

Thursday September 27

Breakfast and Networking

7:30-8:30 a.m.

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 Wednesday night, you'll want to be sure to get to the Hood River Inn early to enjoy a hearty breakfast and great conversation.

Keynote

8:30-9:45 a.m.
John Cochrane

Embracing Disruption

Change has become the new constant in senior living. To stay ahead of the shifting market landscape, senior providers must embrace change as a driver for innovation. HumanGood President and CEO John Cochrane will share his thoughts about the changes in our industry and how disruption can become a force for good to meet the needs of a constantly evolving market.



About John Cochrane

As president and chief executive officer of HumanGood, not-for-profit owner and operator of 18 senior living communities and 63 affordable housing properties in 5 states. HumanGood was formed from the affiliation of ABHOW and be.group where he served as President/CEO. Before joining be.group, Cochrane worked for Lifespace Communities, headquartered in Des Moines, Iowa, where he served as chief operating officer overseeing 11 retirement communities in seven states. Cochrane previously worked as a practicing attorney specializing in real estate and finance, and as executive director of the \$150-million retirement community Oak Crest Village in Catonsville, Maryland. He has his law degree from Northwestern University and a bachelor's degree in political science from Northern Illinois University.

Breakouts

10:00-11:00

A1) Board Track

Enhancing and Understanding Board and Staff Relationships

One of the most common challenges boards face is the lack of clarity surrounding where the board's role ends and where the staff's role begins. The result is often a frustrated Executive Director and a fatigued board. In this interactive session you will learn how to walk the line between being a micromanaging board and a rubber stamp board and identify where you may currently be out of balance. It will also discuss the different hats that board members wear when volunteering for the organization outside of their board responsibilities.

Presenter: Erin Bair, Director, Training & Organization Development, Cascade Employers Association

A2) An Update from APD

Aging and People with Disabilities (APD) has recently seen many changes, with more to come. Department priorities together with HB 3359, the comprehensive long-term care bill, have meant changes as the agency works to make a system that has sustainability, safety, and quality at the core. Join APD Director Ashley Carson-Cottingham as she reviews the DHS/APD Legislative and Budget priorities for the upcoming year. She will also discuss the new Community-based Care Cost Collection Pilot and the Quality Measurement Program & Council. And, hear about the status of the Acuity-Based Staffing Tool and Direct Care Workforce Training as well as Licensing ALF/RCF Administrators. Learn more about how these changes will impact your organization and those you serve.

Guest/Presenter: Ashley Carson Cottingham, Director, Aging and People with Disabilities

A3) Do unicorns actually exist? Cloning and DNA isolation are very real. Do we want or need it?

Non-Profit Senior Living Communities must create a sense of urgency for achieving significant progress toward realizing the vision of the organization and create operational procedures, efficiencies, and realistic time lines to support this basic premise. Senior Living organizations must also demonstrate and measure progress towards their goals, communicate their results, establish a strong, ever growing and broad base of support, and create new sets of expectations for their organizations in order to keep the organization vibrant. The leader in the nonprofit organization is the chief change maker, and the chief innovator. We've all heard "leadership starts and ends at the top". When organizations fail, it's typically a result of a leadership failure. Thus, how critical is it to identify, recruit, hire, and retain your future leaders? Join us as we walk through the current industry challenges, leadership gaps, and learn about some new and innovative ways you and your organizations can stay in front of the leadership curve.

Presenter: James Munn, Senior Living & Executive Search Consultant, CliftonLarsonAllen LLP

A4) In Home Care Roundtable

As the landscape of aging services continues to evolve, the role of In Home Care, whether on your campus or in the community at large, is bound to be part of the equation. Join in the conversation with a panel of members that have Home Care as part of their organization. What have they learned? What works and what needs to be refined? Come ready to share ideas, ask questions, and be part of the conversation. Whether your organization is investigating starting your own agency, or it has been a long-time part of your community - we'd like to hear from you!

Panel Members: MaryHelen Clausing, Rose Villa; Donimique Latimer, Mary's Woods; Mary Scott, Mennonite Village

Breakouts

11:15-12:15

B1) Board Track

Creating a Culture of Philanthropy

Creating a culture of philanthropy in any community is distinct from fundraising as an operation or function. Learn how to create a philanthropic culture and how it will increase your ability to attract donations for your community. Whether you currently have a program in place or are just starting to build your fundraising, you will learn how to assess the culture at your organization and how to take the necessary steps to increase the level of engagement throughout your community. A self-assessment tool will be provided as well as easy take-aways about how to build your philanthropic culture.

Presenter: Karen Rotko-Wynn, CFRE, Executive Vice President & West Division Manager, The Alford Group, Seattle, WA

B2) Using your LeadingAge Membership as a Partner in Purchasing

Join us for an educational and eye-opening session to learn how you can be saving money for your community. Utilize a free, no obligation service provided by LeadingAge to our members. Value First is a Group Purchasing Organization (GPO) that leverages the buying power of members across the country to provide discounted pricing from over 500 quality vendors. As an extension of LeadingAge, Value First works for you drawing on our experience and knowledge of the needs of senior living communities.

Value First is your GPO!

(CEU's are not available for this educational breakout).

Presenters: Trish Korsgren, Director of Business Development, Value First; Denise Wetzel, Manager, Membership Services, LeadingAge Oregon | Value First

B3) An Update from Safety, Oversight and Quality Unit

Join Ann McQueen, the Administrator of the DHS Safety, Oversight, and Quality Unit, for an insightful session as she discusses recent Survey and Complaint Investigation findings and trends. In addition, she'll review the status of online training modules developed to address top issues identified in survey and other licensing actions. Ann will talk about the new system developed to help the agency be more timely and transparent in abuse reporting, the Abuse Reporting Guide (CAMS) - including when to report. She will also talk about the framework for Enhanced Oversight and Supervision which came out of the long-term care bill HB3359. Bring your questions; we'll be sure to have time for Q&As!

Guest/Presenter: Ann McQueen, Administrator, DHS Safety, Oversight and Quality Unit

B4) The Confluence of Media Relations and Law in Senior Living and Care

What will you do when (not if) a crisis happens? How will you communicate with the media? In this educational and interactive session, we will discuss how to manage crisis communications, including the importance of having a crisis communication plan, and working with lawyers and PR professionals. We will cover best practices for managing your message with different stakeholders, including residents, family, staff, and law enforcement. Practical advice and tips will be provided, as well as how to keep your communications with your PR professional confidential during a time of crisis.

Presenters: Gabriela Sanchez and Jeff Brecht, Lane Powell PC

Leadership Luncheon **12:15-1:45 p.m.**

Join us to applaud the LeadingAge Oregon Leadership Academy Class of 2017-2018 as they conclude their year of learning about leadership and the aging services field, and welcome our Class of 2018-2019!

Breakouts **2:00-3:00 p.m.**

C1) Board Track **Strategies for Navigating Change**

Few people like change. Even positive changes can bring on feelings of anxiety and insecurity. In this session participants will explore skills to help deal effectively with change, both individually and interpersonally. Participants will identify the key actions of navigating change, discuss best practices and pitfalls, and learn about the transition model of change.

Presenter: Erin Bair, Director, Training & Organization Development, Cascade Employers Association

C2) Affordable Housing Roundtable

Our guests for our Affordable Housing roundtable will be Matthew Perry, Quality Assurance Advisor and Angela Yardley, Lead Compliance Officer in the HUD Contract Administration Section at Oregon Housing and Community Services. Matthew will share the latest on rent adjustments and contract renewals, and Angela will discuss work related to Management and Occupancy Reviews (MORs). Please join us and come with your own questions for Matthew, Angela, and each other about challenges and successes in your affordable housing community.

Guests: Matthew Perry, Quality Assurance Advisor and Angela Yardley, Lead Compliance Officer, HUD Contract Administration Section, Oregon Housing and Community Services

C3) Tools for Improving Community-based Care and Emergency Services Transitions

Hear from Juliana Cartwright, PhD, RN, OHSU School of Nursing and Diana White, PhD, Portland State University Institute on Aging co-project directors of the Enriched Clinical Learning Environments through Partnerships (ECLEPs). The purpose of ECLEPs was to attract nursing students into long-term care careers through excellent clinical learning experiences. During the project, students were introduced to the population residing in assisted living communities, the staff that supports them, and the emergency service system that responds when needed. The result is a robust set of tools to address quality improvement at the intersection of community-based care, emergency services, and acute care settings. Learn more about the video, simulation cases and documents available for improving CBC and Emergency Services transitions.

Presenters: Juliana Cartwright, PhD, RN, OHSU School of Nursing and Diana White, PhD, Portland State University Institute on Aging

C4) Secrets to Helping New Managers Succeed

Congratulations, you just promoted one of your best employees to manager! Now they're headed into a series of firsts: their first meetings, their first hire, their first performance appraisal, their first disciplinary action. Are they ready? This is a hands-on, fully interactive workshop that explores typical new manager scenarios and the very real challenges that arise. Come ready to discover the secrets to helping people succeed in their first management role.

- Learn how help new managers get started right and succeed in the role from day one.
- Explore how to walk them through the inevitable testing of boundaries by those who used to be this person's peers.
- Discuss how to help new managers take care of themselves for a lifetime of leadership effectiveness.

Presenter: Bill Zipp, Leadership Link

Breakouts

3:15-4:15 p.m.

D1) Board Track

Successful Strategic Planning Board Retreats

Executing a successful strategic planning board retreat is key to long-range planning. Hear from a panel of professionals about how to:

- coordinate an effective process to discuss relevant topics,
- develop an actionable plan for your community as a result of your planning retreat, and
- collaborate with all stakeholders including residents, staff and board of directors both during and after the strategic planning retreat, to communicate progress.

D2) Everyone Has Two Jobs: Creating a Customer Service Culture

We tend to think that only people who interface with customers need to know customer service skills, but everyone has two jobs: the one they were hired to do and customer service. Creating a service culture and developing a service mindset in all employees helps cement solid relationships, not just with external customers, but internal ones, too. In this interactive workshop participants will learn the core skills and attitudes every individual should have, regardless of your position within the organization.

Presenter: Erin Bair, Director, Training & Organization Development, Cascade Employers Association

D3) Preparing for the Future of Skilled Nursing Facility Payment

This session will provide attendees with the knowledge and tools to prepare for the proposed October 1, 2019 implementation of Patient Driven Payment Model (PDPM). PDPM is the proposed skilled nursing facility (SNF) Medicare payment system that links payment to the residents' conditions and care needs rather than volume of services provided (cost-based) or resources rendered (RUGs). Changes include the expansion of case-mix based payment components from two categories to five in addition to changes in how the MDS assessments and data will be used for payment purposes. Attendees will be able to:

- List the 5 case mix components
- Describe the correlation between MDS 3.0 Section GG and the PDPM
- Identify the changes associated with the interim payment assessment

Presenter: Janine Finch-Boyle, VP Regulatory Affairs, LeadingAge

Exhibit Reception

4:30-6:30 p.m.

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. While you're at it, please take a moment to thank the Business Members whose support is critical to LeadingAge Oregon educational programs such as this conference!

Friday September 28

Breakfast and Networking

8:00-9:00 a.m.

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

General Session

9:00-10:30 a.m.

Policy and Trends Update: What Providers Should Know

What will it take to survive - and thrive - in the years ahead? Please join us for this always-fascinating look at the aging services issues that are being addressed in our nation's capitol. Examine the trends and challenges that are impacting LeadingAge members across the continuum and identify opportunities that will ensure your organization can continue to successfully fulfill its mission to serve seniors in the decades to come. And, take a look at the LeadingAge public policy priorities and how federal activities and decisions may impact those priorities and the work that you do on behalf of Oregon's elders.

Presenter: Stephen J. Maag J.D., Director, Residential Communities, LeadingAge

Closing Session

10:45-Noon



Leading with Purpose and Fulfillment: Transforming Your Organization Beyond Vision, Mission and Values

With 40 years of consulting and corporate experience, Jim Finkelstein, President and CEO of FutureSense understands that aging services are, by their nature, driven by their vision, mission, and values and their service to the communities in which they function. But does this translate down to the front line? Does leadership embrace the new science of purpose and fulfillment which is driving the new employment relationship?

- Understand the new science of purpose, where purpose and fulfillment are becoming the new drivers of engagement, retention and performance for organizations.
- Learn how to win the war for talent by hiring exceptional purpose-driven employees where they are empowered to lead their own development and where managers coach and empower their teams.
- See examples of senior communities who have built talent management strategies embracing purpose and fulfillment.
- Engage in key discussions about your talent acquisition, retention and motivation strategies and examine the role that purpose and fulfillment can have in helping you have a robust employee population with limited turnover and excellence in service delivery.

About Jim Finkelstein

With 40 years of consulting and corporate experience, Jim understands the convergence of environment, culture, development and rewards in order to improve business performance through people. He has specialized in business and people strategy, motivation and compensation, and organizational development and transformation. He is the author of *Fuse*. He received his MBA from The Wharton School and a BA from Trinity College.

Schedule at a Glance

Wednesday, September 26

5:00-6:30 Leadership Academy Alumni Reception (Marchesi Winery)

6:00-7:30 Welcome Reception (Marchesi Winery)

Thursday, September 27

7:30-8:30 Breakfast/Networking

8:30-9:45 Keynote
Embracing Disruption

10:00-11:00 Breakouts

A1) Board Track - Enhancing and Understanding Board and Staff Relationships

A2) An Update from APD

A3) Do unicorns actually exist? Cloning and DNA isolation are very real. Do we want or need it?

A4) In-Home Care Panel Discussion

11:15-12:15 Breakouts

B1) Board Track - Creating A Culture of Philanthropy

B2) Using your LeadingAge Membership as a Partner in Purchasing

B3) Update from Safety, Oversight and Quality Unit

B4) The Confluence of Media Relations and Law in Senior Living and Care

12:15-1:45 Leadership Luncheon

2:00-3:00 Breakouts

C1) Board Track - Strategies for Navigating Change

C2) Affordable Housing Roundtable

C3) Tools for Improving Community-based Care and Emergency Services Transitions

C4) Secrets to Helping New Managers Succeed

3:15-4:15 Breakouts

D1) Board Track - Successful Strategic Planning Board Retreats

D2) Everyone Has Two Jobs: Creating A Culture of Customer Service

D3) Preparing for the Future of Skilled Nursing Facility Payment

4:30-6:30 Exhibit Reception

Friday, September 28

8:00-9:00 Breakfast/Networking

9:00-10:30 General Session

Policy and Trends Update:

What Providers Should Know

10:45-Noon General Session

*Leading with Purpose and Fulfillment:
Transforming Your Organization Beyond
Vision, Mission and Values*

Registration Details

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, 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. We encourage all of our Business Associate members to join us as exhibitors. For more information about exhibiting, contact Denise Wetzel, dwetzel@leadingageoregon.org, 503.684.3788 ext. 304

If your company is unable to exhibit and you 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 Tina Goewey, tgoewey@leadingageoregon.org, no later than **Friday, September 14** 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 10** only. **All registration fees increase by \$25 after September 10.**

LeadingAge Oregon

Conference fees:

members

Non-members

Provider members:

First three staff registrants*: \$385 each \$485 each

Fourth and subsequent staff registrants from same site: \$285 each \$385 each

**Staff registrants include CEOs/Administrators, department managers and any other paid employees of a participating organization.*

Nonprofit board members:

Full Conference \$125 \$175

Thursday only* \$100 \$150

**Special one-day rate is available to nonprofit board members only*

Business Associate members:

Per person sponsor fee (Non-exhibiting) \$385 N/A

Per person Non-Exhibitor/Non-Sponsor \$585 N/A

Spouse/guest \$50

Spouse/guest fee includes Wednesday welcome reception and Thursday exhibit reception

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:

\$135 - \$168

Rates do not include applicable taxes.

Participants must make their own room reservations by calling 1.800.828.7873. Be sure to mention that you are with the LeadingAge Oregon conference. After **September 1** 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 4** 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.

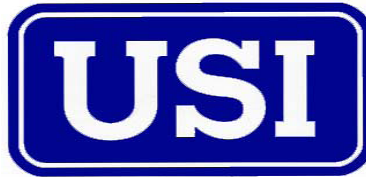
Scholarships

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:

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Interested in a sponsorship?
Contact Denise Wetzel at dwetzel@leadingageoregon.org, 503.684.3788