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LeadingAge™  
Oregon

# 2023 FALL LEADERSHIP *Conference*

Keynote Speaker

**ANDY  
EDEBURN**



Agate Beach Inn, Newport, Oregon

**OCTOBER | 18 - 20<sup>th</sup> | 2023**

Meet the New Leadership Academy Cohort  
[www.leadingageoregon.org](http://www.leadingageoregon.org)

# Thank you!

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LeadingAge Oregon

CEO

**KRISTIN  
MILLIGAN**



# *2023 Fall Leadership Conference*

Dear members and friends,

It's with great pleasure that we warmly welcome you to join the 2023 Leadership Conference, where we will convene as a community of visionary leaders, innovators, and change-makers in housing and long-term care. This year promises to be an exceptional opportunity for us to come together, share, learn and acquire a fresh perspective on aging services. At our conference you can look forward to:

**Inspiring Speakers.** Our lineup of speakers and presenters have invaluable experience and bring a wealth of knowledge, expertise and real-world insights to aging services. They will share stories and strategies to inspire and strive for excellence our field.

**Collaborative Learning.** The conference provides a unique opportunity to connect with your peers, build valuable relationships, and explore potential collaborations that can drive innovation and growth.

**Skill Enhancement.** Engage in sessions and interactive workshops to enhance your leadership skills, and elevate your ability to tackle complex challenges, and drive innovation in your community.

As we convene under the banner of leadership, let us acknowledge that our collective strength lies in our unity and shared dedication to excellence. Together, we have the power to propel progress, surmount obstacles, and craft a future that shines brighter for all.

With gratitude,

A handwritten signature in cursive script that reads "Kristin Milligan".

Kristin Milligan  
LeadingAge Oregon CEO

# SCHEDULE OF EVENTS

Agate Beach Hotel  
Newport, Oregon

## Wednesday, October 18

1:00PM - 5:00PM	Leadership Academy Meeting
3:00PM - 5:00PM	Board Retreat
5:30PM - 7:30PM	Wine & Cheese Welcome Reception

## Thursday, October 19

7:30AM - 8:30AM	Breakfast/Networking
8:30AM - 10:00AM	Keynote: Andy Edeburn - Navigating through the "Perfect Storm"
10:15AM - 11:30AM	Breakout Sessions
11:30AM - 1:00PM	Leadership Luncheon
1:15PM - 2:30PM	Breakout Sessions
2:45PM - 4:00PM	Breakout Sessions
4:15PM - 6:00PM	Leadership Academy Meeting
5:30PM - 7:00PM	Trade Show Exhibit and Reception

## Friday, October 20

8:00AM - 9:00AM	Breakfast/Networking
9:00AM - 11:30AM	Workshop: Mixing Emotional Intelligence and Mindfulness: A Recipe for Leadership success



With appreciation to USI for Its Principal Sponsorship of this conference.

# *Trade Show Vendors*

Ankrom Moisan

BC Group

Columbia Roofing & Sheet Metal

Compass Community Living

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Elderwise

Energy Trust

Hubbell

LRS

Optum

Pacific Mat & Flooring

Pence

Reliant Rehab

R&H Construction

Slater Insurance

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USI

Value First

Walsh Construction

# Thursday, October 19

## Keynote: 8:30 - 10:00 AM

### Navigating through the “Perfect Storm”

Aging services organizations are starting to grapple more thoughtfully with what this has meant, where we are going, and what we need to be doing to remain viable and relevant into the future. Strategy is once again on our minds, but how to adapt and respond may be different – and more crucial – this time around. This session will delve into the factors that have culminated the "perfect storm" for service providers, the essentials for moving into uncertainty in the near and long-term, and guidance for how to think strategically about your organization's future and the options available to you.

#### Objectives

- Recognize key trends and forces driving change for aging services organization
- Evaluate organizational position and viability as a result of the pandemic
- Summarize a potential strategic path given position and market opportunity

#### ABOUT ANDY EDEBURN, MA

Nearly 20 years of healthcare consulting experience, specializing in acute, primary, post-acute, and senior care services. Nationally recognized expert on post-acute care, aging services, and the integration of acute and post-acute services. Consulting and operational advisement to more than 250 organizations across the country regarding post-acute programs and services. Areas of expertise include strategic planning, acute/post-acute integration, provider network development, and managed care. Guides organizations through their strategic thinking and planning around acute and post-acute partnerships, new program and facility development and redevelopment efforts, and establishing value- and outcome-oriented relationships as organizations transition from fee-for-service to value and risk.

Keynote Speaker

**ANDY  
EDEBURN**



**Founder, Elder Dynamics**  
Healthcare advisor and thought-  
leader across post-acute, elder care  
and the community continuum

**LeadingAge™**  
Oregon



# ***Socializing & Networking***

## **WINE & CHEESE WELCOME RECEPTION**

Wednesday, October 18 · 5:30 – 7:30PM

Start making the connections that count! Join us for a wine and cheese reception to meet with your peers from other organizations before the conference begins.

Thanks to **Deacon Construction** for sponsoring this event.

## **THURSDAY BREAKFAST**

Thursday, October 19 · 7:30 – 8:30AM

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

## **LEADERSHIP LUNCHEON**

Thursday, October 19 · 11:30 – 1:00PM

Join us to applaud the LeadingAge Oregon Leadership Academy Class of 2022–2023 as they conclude their year of learning about leadership and the aging services field, and welcome our Class of 2023–2024!

## **EXHIBIT AND RECEPTION**

Thursday, October 19 · 5:30 – 7:00PM

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. In true LeadingAge Oregon style, we'll have some great prizes to win!

## **FRIDAY BREAKFAST**

Friday, October 20 · 8:00 – 9:00AM

Start the last day of the conference by networking with your colleagues and sharing thoughts and ideas about what you have learned.



# Thursday, October 19

## Breakout Sessions 10:15 - 11:30 AM

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### A1 AI in Aging Services

**Presenter: Scott Cod, LeadingAge, and Adam Arker, Hartman Executive Advisors**

In this session we'll explore the application of Artificial Intelligence (AI) in the realm of housing and long-term care. From patient care to administrative efficiency learn how AI is transforming how we provide care to the aging population. Join us to discover real-world examples, lessons learned, and the latest AI technologies driving innovation in long-term care. Whether you're a administrator, or simply interested in the future of healthcare, this session promises valuable insights into the AI-driven transformation of long-term care.

### A2 Helping People Live Well While Dying

**Presenter: Lesley Sacks and Marci Donaldson, Hopewell House**

Join Lesley Sacks and Marci Donaldson to learn more about Hopewell House and their unique model as Portland's only dedicated end-of-life residence. Hear not only about their model of care, but also how you can put some of the principles to work in your community. Lesley and Marci will also discuss the "Hopewell Wheel of Care" and how it supports living well in the presence of death and dying.

### A3 Strategies for Building Sustainable Organizations

**Presenter: Mary Muñoz, Ziegler**

Prior to the COVID pandemic, housing, care and service providers for older adults were beginning to consolidate, with an increasing number of transactions over the past ten years. COVID accelerated this activity, as providers across the country saw increased stress, especially in skilled nursing. Additionally, areas of operating weakness were magnified during COVID; labor shortages were magnified as well, and in some cases, employees are not coming back. These factors have led to financial stress across many organizations stemming from concurrent depressed revenue and increased expenses, especially salary and benefits.

Some organizations are able to maneuver through these troubled waters to improve profitability. Other organizations have opted to reposition their portfolios, divesting of non-core assets or reducing the size/closing certain levels of care. Some weaker organizations have asked to join stronger organizations. Others have entered into strategic partnerships to diversify service mix, share risk, bring outside perspective, or bring new management. Still others have faced bankruptcy or closure.

This session examines the key characteristics of sustainable business models and strategies organizations can take if they determine their current models are not sustainable.





# Thursday, October 19

## Breakout Sessions 1:15 - 2:30 PM

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### **B1 Nightmare on Survey Street: Strategies to Manage the CBC Survey and Enforcement Process**

**Presenters: Gabriela Sanchez and Jeff Duncan, Lane Powell**

This session examines the Nursing Home survey and enforcement process, including the roles of DHS and CMS. Using real world examples, the presenters guide you through how to interact with surveyors, how to manage the dreaded immediate jeopardy tag, when to request an IDR versus an I-IDR (and how those processes generally function in reality), and when to request a formal hearing with the Federal Departmental Appeals Board instead of accepting a 33% of discount. Strategies for reducing civil monetary by 50% penalties when you self-report are discussed. Additionally, learn about NATCEP waivers and the impact of civil monetary penalties on your ability to conduct nursing training programs at your communities.

### **B2 Oregon Housing & Community Services Updates**

**Presenters: Sara Carrillo and Eva Luna, Oregon Housing and Community Services**

This session provides an overview of the HUD contract administration section at Oregon Housing and Community Services and provide some agency updates. Presenters also provide a brief update on some of the recent HUD changes such as HOTMA, contract renewals, streamlining management and occupancy reviews and answer any questions you may have.

### **B3 LeadingAge Oregon Overview and 2023 Legislative Summary**

**Presenter: Kristin Milligan, LeadingAge Oregon CEO**

Whether you're a newcomer to the LeadingAge Oregon network or a seasoned member seeking to refresh your understanding of our association services and offerings, this session is for you. We will provide a comprehensive overview of LeadingAge Oregon and member benefits. Recognizing the pivotal role legislative updates play in shaping your operations and services, we will also dive into the key bills arising from the 2023 legislative session. To conclude, we'll foster an open discussion and information-sharing forum, to discuss specific challenges or opportunities in your communities. This discussion will help guide LeadingAge Oregon's legislative and regulatory priorities for 2024.



# Thursday, October 19

## Breakout Sessions 2:45 - 4:00 PM

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### C1 An Update from Aging and People with Disabilities: Priorities for 2023 and Beyond

**Presenter: Jack Honey, Oregon Department of Human Services**

Join Jack Honey, Safety, Oversight and Quality Administrator, Aging and People with Disabilities as he discusses how APD is keeping up with the changing landscape of senior living. APD has identified goals of well-being, accessibility, quality outcomes, service equity, and engagement to support the vision they have that Oregon's older adults, people with disabilities and their families experience person-centered services, supports and early interventions that are innovative and help maintain independence, promote safety, wellbeing, honor choice, respect cultural preferences and uphold dignity. Learn more about how state strategies may affect your organization's operations, your staff, your residents and clients, and Oregon's system of long-term services and supports.

### C2 10 Things You Hate About the SNF Survey Process and What you Can Do About It

**Presenters: Gabriela Sanchez and Jeff Duncan, Lane Powell**

This session takes a deep dive into the Community Based Care survey and enforcement process. The presenters guide you through the entire enforcement cycle, sharing best practices along the way. This includes management of informal conferences, including the formal hearing process. Real world examples are shared as part of a discussion on how the survey process works, best practices for interactions with surveyors and APS investigators, what do to when you receive your survey results, and when to request an informal conference. Learn how APS' investigations fit into this equation and how substantiated findings of abuse may affect your ability to retain your care staff. In addition, understand the different penalties and when to request a formal hearing – and steps to help increase your chances of a successful appeal or of reaching an appropriate negotiated resolution.

### C3 Mental Health Services in Senior Living

**Presenter: Evan Alvord, Rogue Psych Consultants LLC**

Mental health concerns are common among seniors and include isolation, anxiety disorders, dementia, and psychosis, among others. Discover how mental health services are being integrated into some communities and how these services can support providers in addressing a range of issues including: diagnostic clarification; behavioral management techniques; psychotropic medication reviews; and risk management. Mental health support and interventions can lower hospitalization rates; aid in regulatory compliance, and improve staff's ability to provide effective care. During this interactive session we want to hear the barriers and challenges you face in supporting older adults and meeting their behavioral and mental health needs; and discuss steps providers can take to improve better care and outcomes for their residents.

*Friday, October 20*

*Workshop 9:00 - 11:30AM*

## Mixing Emotional Intelligence and Mindfulness: A recipe for Leadership success

Get ready to dive headfirst into an energetic, power-packed session that's about to redefine your leadership game! "Emotional Intelligence + Mindfulness = Unstoppable Leadership" is a presentation designed for leaders who are game to ignite their team's performance and conquer the business battleground. Forget about those dry theories or jargon-filled speeches. We are all about understanding emotions, being in the 'here and now,' and leveraging these to carve out a trailblazing leadership path.

### ABOUT STEVE HOPKINS

For over 20 years, Steve has had the pleasure of working with and supporting a multitude of organizations on their journey to develop strong, capable leaders. At Jordan River Group, he takes a functional approach to leadership coaching that uses your ecosystem to shape the coaching so that it can be applicable and relevant. This leaves the organization with a high ROI while accomplishing this 100% virtually, with very minimal time away from the work ecosystem.

### ABOUT AMANDA LYNCH

A growth-minded business leader with 10 years of progressive responsibility building and directing innovative home and community-based senior services, Amanda is passionate about turning visions into profitable realities by uniquely empowering individuals and building cohesive, unstoppable teams.

**STEVE  
HOPKINS**

Jordan River Group



**AMANDA  
LYNCH**

Jordan River Group



# REGISTRATION INFORMATION

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

To register, go to [www.leadingageoregon.org/leadership2023](http://www.leadingageoregon.org/leadership2023)

## 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. Each exhibitor may have up to two representatives join us for the full conference (not receiving CEUs).

If your company is unable to exhibit and you wish to attend the conference as a sponsor, please contact Rob for sponsorship opportunities. For more information about exhibiting and sponsorships, contact Rob West, [rwest@leadingageoregon.org](mailto:rwest@leadingageoregon.org), (503) 968-7205

## CANCELLATIONS

Cancellations must be sent in writing to Rob West, [rwest@leadingageoregon.org](mailto:rwest@leadingageoregon.org), no later than Monday, October 9 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 18, 2023. All registration fees increase by \$25 on September 19.

# REGISTRATION

Early Bird fees shown below are good until September 18  
Rates increase by \$25 on September 19, 2023

CONFERENCE FEES	MEMBERS	NON-MEMBERS
PROVIDERS	\$375	\$475
BOARD MEMBERS OF PROVIDERS	\$150	\$225
BUSINESS PARTNERS	\$595	N/A
SPOUSE/GUEST	\$75	N/A

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

## LODGING AT THE BEST WESTERN AGATE BEACH INN



Just outside the Best Western Plus Agate Beach Inn, guests will find themselves in a secluded seaside haven and surrounded by breathtaking Agate Beach Oregon views. Close by this Newport, OR hotel, guests can spend the day golfing, deep sea fishing, Newport whale watching, or simply just enjoying a day on the Oregon coastline. No matter what guests choose to do here at the Best Western Plus Agate Beach Inn, they can take in the views of the Pacific Ocean, Agate Beach and the Yaquina Head Lighthouse wherever they are in Newport, OR.

Participants must make their own room reservations by calling (541) 265-9411. Be sure to mention that you are with the LeadingAge Oregon conference.

REGISTER ON LINE AT  
[www.leadingageoregon.org/leadership2023](http://www.leadingageoregon.org/leadership2023)