

**Tuesday**

**10:00 am - 11:00 am**

**56-P Serving the Middle Market Through the Lens of Diversity, Equity, and Inclusion**

*Dustin Julius, Evon Bergey, Beverly Asper, Michel Gibeault, Elizabeth Soto*

*Finance, Governance*

Pennsylvania's lack of affordable housing affects many in the mid- to low-income range, but it has disproportionality impacted older people of color. This inequity has compelled senior living provider, Landis Communities (LC), to become intentionally and strategically involved in providing housing options to meet this market need. Explore programming, engagement, design, and funding strategies to develop age-friendly, diverse, middle market housing.

This session will delve into the formation of key strategic partnerships for successful community integration and inclusion. The panel will highlight housing strategies that address the key themes of Innovation and Social Impact, Economic Security, and Justice and Equity. Innovation and Social Impact: Through a strategic listening process, LC learned that the current diverse demographic of older adults has different priorities and less resources than previous generations. This inspired LC to create housing options that align with expressed desires for authentic inclusion in a thriving community where limited personal assets can be better leveraged through easy access to affordable services.

These goals required a site selection process for locations with adjacent existing community amenities to minimize the need for traditional senior living commons spaces. This approach allows a diverse group of older adults with limited, fixed incomes to remain an integral part of the neighborhood. A critical component was formulation of an innovative funding model that does not rely on highly competitive and restrictive tax credits. Economic Security: The panel will explore key steps needed to evaluate the viability of the market for the proposed housing type. Attendees will learn how the team analyzed demographic and economic indicators in areas being considered. Panelists will explore how program parameters and design discipline informed common space, building characteristics, and layout to reduce construction costs, maximize efficiencies, and maintain the desired price point. The panelists will share how the funding model features a combination of government grants, donations, and debt in lieu of tax credits. The session will also highlight other available financing options to consider when developing housing for older adults with a limited, fixed income. Justice and Equity: This panel is diverse in age, racial, and gender makeup, and will highlight their unique perspectives and contributions to the development process. They will share strategies for engaging a diverse, urban population to develop complementary, affordable housing that becomes an integral part of the neighborhood. The diversity consultant for the development team will share her approach to introduce new housing that reflects the diversity of the surrounding neighborhood for both residents and staff members. She will discuss strategies for connecting with local housing groups, social services, and various faith communities, as well as business and rental property owners. She will identify the care and support resources needed for an age-friendly residence that reflects the ethnic and financial diversity of the surrounding neighborhood and helps older adults remain engaged in their community.

**11:15 am - 12:15 pm**

**57-P Inclusive Leadership: Respecting the Whole Person**

*Joanne Campagna*

*Workforce*

As our workforce and communities become more diverse, we must be prepared to engage and support the whole person. This means having the skills to lead not only our team members, but the persons served – our residents. This session explores the meaning of being an inclusive leader and takes a closer look at the intersectionality of ageism and sexual orientation.

**1:00 pm - 2:00 pm**

**58-P Keeping Positive in Today’s Diverse Workplace**

*Karen Hammond*

*Operations, Workforce*

Attendees will begin by participating in an icebreaker to discover how important first impressions are, and how they can lead to misguided opinions and inaccurate assumptions. The results of the gathered information will lead to reviewing and discussing basic human needs. It will concentrate on how meeting those needs help to create a positive environment, both at work and home. Balance in our lives can bring about positive attitudes, which can generate a thriving lifestyle and work ethic.

We will define Diversity, Equality, and Inclusion, using both the formal dictionary definitions and characterizations that are current trends. The workforce is so varied in today’s world, and we will touch on the generations that help to form present day and future culture. The group will also review trending language that is used in positive ways, but also how some of those expressions create negative and hurtful outcomes.

The feeling of not being accepted is one that can be destructive and non-productive. The presentation will translate why different can be good and acceptance is key for success. Through active discussion we will explore what is "different" anyway?

Many team players develop bad habits in their work ethic, and often those habits are reinforced for various reasons. We will create a list of those habits and explore how a team leader can avoid those behaviors in their community. Suggested proper reinforcement and motivation techniques will be evaluated. Conflict that arises from these actions can create hostility among the team, and the possible causes of those conflicts will be considered. Each attendee will learn if they are good motivators and how they can identify the basic principles of motivation.

Finally, the group will consider the importance of effective evaluations and create goals and objectives that address the specific diversity, equality, and inclusion practices that result in a rewarding evaluation. Attendees will have many new techniques and best practices to take back and institute in their community.

**2:15 pm - 3:15 pm**

**59-P From Awareness to Action: White Horse Village’s IDEA Committee**

*Len Weiser, Tonya Costley-Stilts*

*Operations, Workforce*

Diversity, inclusion, equity, and advocacy can mean different things to different people and organizations. White Horse Village, while not very diverse from a resident or financial perspective, is a community that tries hard to welcome and include people from varying backgrounds; it prides itself in being a friendly, inclusive community. Team members bring more diversity to the community, and efforts are made to educate on and embrace these differences.

At the request of residents, White Horse Village developed a formalized committee focusing on inclusion, diversity, equity and advocacy, called the IDEA Committee. It is co-led by a resident and team member, and includes team members and residents from various departments and backgrounds.

This workshop will inform participants of how the committee was developed, its role within the larger organization, and how it functions. An annual strategic plan is developed for the committee that outlines its initiatives for the upcoming year, and resources within the annual budget are allocated to the committee.

The evolution of the Committee, past initiatives, future programming ideas, and strategic priorities will be shared with participants.

**3:30 pm - 4:30 pm**

**60-P Creating Brave Spaces for Conversations about Diversity**

*Marsha Wesley Coleman, Jennifer Jimenez Maraña*

*Operations, Workforce*

How can your organization provide space for meaningful dialogue about important social issues without allowing varying viewpoints to cause friction and division? This session will share guidelines for creating Brave Spaces that foster trusting, open, and honest dialogue at the staff, board, and resident levels. Presenters will describe how they used these guidelines to create spaces where people could share feelings and opinions about race and work, and then begin working together to bring about change. Session attendees will join small groups to discuss how to apply Brave Spaces guidelines to their organization’s DEI efforts.

A Brave Space is a safe and trusted atmosphere, embedded in courage, where individuals are challenged and supported in dialogue on diversity, equity, and inclusion. Benefits of Brave Space include better learning innovation and adaptability, higher creative levels, stronger staff morale, more efficient problem-solving, and more.

The steps to create a Brave Space are 1)Speak your truth: Use “I” statements; 2)Listen actively; 3)Step back, step up: share speaking time; 4)Respect multiple viewpoints; 5)Own your intention and impact; 6)Take risks: lean into discomfort; and 7)Confidentiality: Share the message, not the messenger. We will also explore the diversity wheel to show the various ways we differ from others and to help understand the reasons why people don’t speak up.

Facilitators will provide input on each step, as well as an interactive poll and videos to illustrate the importance of Brave Space. We will include two small group breakouts where attendees can share what respect means to them and the variety of ways respect can be expressed, experienced, and understood, and what they are doing or will do in their organizations to create Brave Space.

**Wednesday**

**7:00 am - 8:00 am**

**FOA-1 Age of Champions**

Age of Champions is a documentary following five competitors who compete for gold at the National Senior Olympics. Watch as a 100-year-old tennis champion, 86-year-old pole vaulter, and rough-and-tumble basketball grandmothers all triumph over the limitations of age and pursue their athletic dreams.

**9:15 am - 10:15 am**

**GS-1 Rubber Band Resilience: How Senior Care Can Stretch Without Snapping**

*Kathy Parry*

*Operations, Workforce*

You are disrupted. Your teams are stretched. Not only has the COVID-19 crisis transformed the way you work, but changes from technology, regulations, and staffing/retention, are all affecting LeadingAge PA professionals. The ability to apply a disruption-friendly mindset to transitional shifts will be necessary to serve residents, retain personnel, and meet budgets. Equipping conference participants with the skill set to move through transitions while continuing to stay productive and engaged is imperative to successful organizations.

Roadblocks and unforeseen adversity, both personal and professional, stretch us every day. In this powerful keynote, Kathy will share how devastating news led her on a journey to discovering the keys to thriving in the face of challenging circumstances. While sharing her 3-R method for resilient behaviors (React, Reframe, Re-energize), Kathy will engage the audience with interactive exercises.

Kathy will inspire and encourage your audience to stretch, not snap when faced with disruption. Known for her candid stories and optimistic approach, Kathy is an expert in creating energetic teams and engaged professionals.

**10:30 am - 11:30 am**

**01-A All Things Medicare: Impactful Updates and Strategies for Senior Living Providers**

*Ed Klik, Sophie Campbell, Kristopher Pattison*

*Finance, Governance, Operations*

As the senior living industry continues to be challenged from an operational perspective as a direct result of the current pandemic, providers are looking for opportunities to maintain and enhance revenue while trying to control increasing operating costs.

As we are approaching the end of the third year of the Patient-Driven Payment Model (PDPM), the Centers for Medicare and Medicaid Services (CMS) will be revisiting for FY2023 the delayed FY2022 proposed changes to neutralize the significant payment increases providers enjoyed during the first two years after implementation, in addition to other considerations.

Join Baker Tilly for an informative session that will focus on changes that impact senior living providers from industry, compliance, clinical, and reimbursement perspectives. Strategies to optimize PDPM reimbursement, support MDS coding with documentation, and utilize Certification and Survey Provider Enhanced Reports (CASPERs) to help address areas of risk will all be discussed. We will also discuss strategies for maintaining an effective compliance program by utilizing auditing and monitoring tools to capture supportive documentation such as Medicare Triple Check, Program for Evaluating Payment Patterns Electronic Report (PEPPER), SCIO Health Analytics Requests, Targeted Probe and Educate (TPE) Requests, Recovery Audit Contractor (RAC) Requests, and more.

**10:30 am - 11:30 am**

**08-A Happy Little Trees: Shaping the Future of Memory Care**

*Joe Lutz, Melody Karick*

*Assisted Living/Personal Care, Clinical, Operations*

This session will focus on the design process and clinical benefits of therapeutic landscapes in the memory care environment. Joe Lutz, a Landscape Architect with RGS Associates, will begin the session by sharing the history of therapeutic landscape design, the relevant work of environmental psychologists, the unique design process involved in the creation of therapeutic landscapes, and what specific qualities and physical components make up a successful therapeutic landscape for varied users’ needs.

The second half of the session will highlight first-hand observations of a memory care courtyard in use led by Melody Karick, the director of Meadow View Memory Care at Garden Spot Village. Melody was involved in the initial planning of this space and will share her personal accounts, benefits, and lessons learned pertaining to the Meadow View Memory Support Community’s courtyard designed by RGS Associates. Melody is involved with the residents’ daily well-being, comfort, and safety in which the courtyard plays a major role.

As designers and clinicians, it is our responsibility to get the design and implementation of these spaces right. It is known that therapeutic landscapes reduce stress, improve clinical outcomes, and help to restore a sense of order in residents’ lives. There is a large amount of research pertaining to the design of these spaces we should be aware of and many good (and bad) examples to cite before we embark on their design. By first understanding what makes up a successful therapeutic landscape, we can then begin on the design and execution of these spaces.

The population benefiting from therapeutic landscapes is exploding. Now more than ever a well-designed outdoor setting that provides a restorative connection with nature, while focusing on the physical, psychological, social, and spiritual benefits of landscape, is needed.

**10:30 am - 11:30 am**

**17-A Staff: The New Consumer!**

*Stacy Hollinger Main, Frank Mandy, Mary Kay McMahon*

*Workforce*

Set the Stage: The pandemic has put tremendous strain on senior living communities, leaving behind a wake of overworked staff members who face mounting stress. With a shrinking workforce, increasing wage rates, and labor policies that have dampened return-to-work incentive, the pressure is on for Life Plan Communities (LPC) to recruit and maintain a highly-motivated and engaged team. This moderated speaker panel will include senior living community leaders who will share innovative strategies to respond to current and evolving changes to the human resource landscape.

Understanding the Problem: In recent years, LPCs have changed the way they market to resident consumers – evolving from a 'we sell products and services' to 'we create lifestyles and experiences' mindset. As communities compete with other industries for staff, they must evolve similarly in how they recruit and retain new team members. This applies tenfold as the newest members of the workforce, Generation-Z, enter the stage. While previous generations placed value on organizational culture and transparency, Generation-Z demands it!

Strategy 1: HR Needs to Think Like the Sales Team. In this new approach, human resource leadership can build recruitment and retention momentum by thinking more like a sales and marketing team - recognizing that recruits are seeking authentic connection to the community story, brand, and mission. This means that onboarding new staff must involve more than policy manuals and prerecorded training sessions. Recruits want to know and be known by the people they are working for, and they crave the same deep connection to the organization that residents do.

Strategy 2: Tap Into the OTHER Human Resource. Communities have an often untapped human resource in the residents they serve. Participants will learn how strengthening the connection between residents and staff by moving beyond a patron-server relationship benefits both parties and the community. Residents can also support staffing needs through volunteer roles, such as greeters, instructors, and the like.

Strategy 3: Holistic Programs. This session will explore how communities can develop programs that help them grow and strengthen their workforce through holistic, mind/body/soul wellness. Speakers will share ways in which they are helping staff gain access to fitness, healthy food, and other supports to help them stay well on the job and off. This concept can extend to assistance with childcare, shopping deliveries, auto maintenance, etc.

Strategy 4: Design - The Silent Partner. As the senior living industry has moved toward a resident-centered experience, we have focused on maintaining resident convenience at all cost, and that cost has typically been paid by the staff through longer travel distances, heavy meal carts, repeat trips, inadequate staging and storage areas, etc. Over time, the compounding effect of these inefficiencies have contributed to an exhausted workforce at its breaking point.

A decade from now, present staffing shortages will pale in comparison as national demographics shift to the ballooning number of retirees and shrinking workforce. This session will explore how regulatory bodies, designers, and providers must collaborate to address this future reality in long-term care - from design strategies to emerging technologies that maximize staff efficiencies and reduce FTE requirements, while maintaining desired services.

**10:30 am - 11:30 am**

**26-A 2022 Long-Term Care Provider State and Federal Legal Update**

*David Marshall, Jennifer Russell*

*Assisted Living/Personal Care, Finance, Governance, Operations*

The last year’s headlines, both within the long-term care community and for our nation as a whole, have been dominated by the COVID-19 pandemic. The fight against the pandemic has impacted all areas of operation of long-term care providers, and spawned numerous legal issues that continue to this day. As we proceed through the second year of the pandemic, providers will need to understand these legal issues as well as the regulatory, statutory and judicial changes that impact their operational responsibilities. In addition, as we begin the return to a “new normal,” traditional governmental oversight of health care providers will return, and providers will need to prepare for the resumption of the survey and audit processes and understand changes in law and regulation that have developed outside of the COVID-19 area.

The presenters will provide updates on the important legal issues arising from the COVID-19 pandemic. The session will address current regulatory requirements involving visitation, vaccination, and other reporting obligations associated with the response to COVID-19. The presentation will address ongoing immunity/liability issues for providers, federal and state enforcement requirements, and the responsibilities and obligations associated with the receipt of federal and state financial payments.

Following the review of the current and anticipated legal issues associated with COVID-19, the presenters will review and preview other legal issues impacting long-term care providers. For nursing facility providers, the presenters will discuss the latest developments with respect to the Pennsylvania Department of Health’s initiatives to enact revised licensure regulations, and address the impact of those proposed changes on operations and the survey and enforcement process. The presentation will address current and proposed federal and state reimbursement changes. The session will also discuss hot topics and recent developments in fraud and abuse, including recommended updates and review of Corporate Compliance Plans, proposed modifications to the HIPAA Privacy Rule, and other operational issues. It will provide guidance on how to address those matters to ensure continued compliance with current law.

The speakers will review developments affecting other components of the post-acute continuum, including regulatory changes affecting personal care home/assisted living facility providers, issues affecting CCRC operations, and important home and community-based services updates. Of particular interest to nonprofit providers, the session will review the latest issues involving real estate/sales and use tax exemption and other structuring/corporate matters. Finally, the presenters will preview issues and trends to come in 2022 and 2023 so that attendees can monitor these developments over the coming year.

**10:30 am - 11:30 am**

**35-A Broaden Your Reach: Strategies to Expand Mission and Increase Market Share**

*Bill Koch, Jr., Helen Foster*

*Finance, Governance, Marketing, Operations, Sales*

Let’s face it, nonprofit senior living communities are struggling to remain a preferred living option for today’s seniors. What does it take to become a driving force in the industry? We will be highlighting one provider's ongoing expansion efforts, and how they remain a top operator in the country.

**10:30 am - 11:30 am**

**44-A Introduction to Affordable Assisted Living Development**

*Marc Silver, Rob Downing, Kevin Hancock*

*Assisted Living/Personal Care, Finance*

Pennsylvania ranks #4 in percentage of people over 65 and over 85. By 2030, 29% (4 million) of the population will be over 60 years old, and 70% of them will need long-term care. Currently, low-income seniors qualifying for long-term care have no choice other than nursing homes. Other states such as Illinois and Indiana, have numerous Affordable Assisted Living Communities (AALC) available to low-income seniors. These facilities are primarily funded by Medicaid and Social Security Supplemental, and cover all costs of housing, meals, and 24-hour care in communities that rival $6,000+ monthly market rate assisted living facilities. In Pennsylvania, seniors in need with limited financial resources remain at home with family and home health care until a skilled nursing facility is their only choice. This new program would alleviate the need to care for many of these seniors in a skilled nursing facility setting and provide care in an assisted living setting, which is less costly and more socially appealing. This session will detail the development of these communities in other states and provide an overview of the progress that continues to be made for these communities to become an option for Pennsylvanian seniors.

**10:30 am - 11:30 am**

**50-A Preparing Your Community’s Network for the Connected Resident: Questions to Ask Now**

*Alex Thomas, Jonathan Mifflin*

*Finance, Operations*

Morefield has seen an increasing demand on the evolving network needs of senior care communities. As we work within communities, we have seen a drastic increase in the reliance on internet bandwidth trending as smart devices and IoT skyrocket into the lives of families. Video-enabled applications that offer the ability to see each other with the touch of a button, to communicate with medical professionals, alert maintenance or request transportation, are just a few of the conveniences that have become the social norm of today’s senior living community. While many older adults still hesitate to fully embrace some technologies, simple-to-use devices have made navigating the digital world easier, and the circumstances of the past few years have forced many to adapt.

Smart technology use continues to trend upward and has generated a greater demand for bandwidth and expanded wireless capabilities throughout senior communities. Administrators are now responsible for providing support to a variety of smart devices that are connected, accessible, and protected on the network. This rising demand brings into perspective the need for future planning of the networking and Wi-Fi

**1:30 pm - 2:30 pm**

**02-B Leveraging Engagement Technology for Resident Well-Being**

*Kyle Robinson, Kerry Hoke, Keri Smith*

*Operations*

Messiah Lifeways, a Life Plan Community in Mechanicsburg, has embraced an updated wellness model focused on elevating residents' purpose, creating meaningful social connections, and enhancing personalized well-being through engagement technology.

Hear how executives from the organizations describe studies documenting the importance of purpose, social connectedness, and spirituality for longevity and life satisfaction. See how wellness models can also include autonomy, grit, and resilience. Presenters will also describe how various learning styles support any technology initiative and roll-out, and will address what worked and what needed improvement. Learn how an open approach to data visualization supports both short and long-term operational planning.

The audience will explore how structured data sets and artificial intelligence may support life enrichment programming. We will discuss the challenges and opportunities that often keep senior living organizations from adopting new technologies and programs. And finally, the presenters will share tools and strategies that the organization used to lean into a more robust engagement model.

**1:30 pm - 2:30 pm**

**09-B Come Together: Fostering Innovation in Your Local Market**

*Erin Dunn*

*Assisted Living/Personal Care, Clinical, Operations*

The expectations of the health care consumer have changed dramatically over the past 18+ months. Senior services providers across the country and the care continuum are struggling to keep up and develop meaningful offerings that speak to the shift from reactive medical service interventions to proactive, wellness-based services. Attendees will be encouraged to participate in this interactive session designed to create dialog and inspire collaboration between regional market-makers.

**1:30 pm - 2:30 pm**

**18-B Employment and Labor Law: What's New in '22?**

*Andrew Dollman*

*Finance, Governance, Operations, Workforce*

COVID-19; Vaccination mandates; legal challenges in federal court and beyond; workplace harassment in today’s age of “Me Too”; employees’ claims of privacy violations; substance abuse and the growing use of medical marijuana; employees’ use of electronics in the workplace; employees’ social media use affecting fellow employees in the workplace; failure to update the Employee Handbook to reflect current practices; joint employment; enforcing confidentiality and non-competition clauses; interpretation of criminal record background checks under Clean Slate; supervisors failing to manage miscreant employees; regulation of off-duty conduct; and employees on intermittent Family Medical and Leave Act (FMLA) leave issues all create a complex and overwhelming workplace for management.

This is especially true in the long-term care community where human resource departments are responsible for compliance with a variety of federal, state, and local regulatory agencies - some of which are seemingly inconsistent with one another. The regulatory landscape is ever-changing based on the implementation, administration, and composition of regulatory agency staff.

Whether session participants are part of a large or small human resources department, vice president, or a generalist, they will be advised about recent developments in employment and labor law. This will include COVID issues, FMLA, Title VII discrimination cases, National Labor Relations Board activity, social media issues, privacy issues, and medical marijuana. Other areas of emphasis will include litigation settlements and strategies to avoid protracted litigation.

Presenters will draw on their experience by sharing real life examples and hypothetical scenarios to help participants understand how various employment and labor laws apply to their employers. Participants will learn best practices under employment and labor laws, rules, regulations, and court decisions to successfully avoid legal mistakes and the potential for litigation. Context will be provided by updated legal authority to the employer's advantage in litigation before the Pennsylvania Human Relations Commission, the U.S. Equal Employment Opportunity Commission, and the state and federal courts.

Depending on the introduction of rules, regulations, legislation, and court rulings between now and June 2022, this session will also address other "updated issues" in state, federal and local law as they apply to labor and employment issues.

**1:30 pm - 2:30 pm**

**27-B Updates on Incentivizing Quality Care from the Office of Long-Term Living**

*Jamie Buchenauer*

*Operations*

The Department of Human Services (DHS) has implemented comprehensive changes to the long-term care system through the implementation of Community HealthChoices(CHC).

CHC offers DHS opportunities to incentivize managed care organizations (MCO) to pursue innovative strategies to better meet participants’ needs for housing, nutrition, employment, and other social determinants of health. DHS continues to evolve the CHC program and has been able to use funding provided by the federal government to incentivize quality improvement as well. This year’s priorities for the Office of Long-Term Living (OLTL) include working with each MCO on instituting value-based purchasing programs, the nursing facility quality incentive program, and facilitating nursing facility resident access to behavioral health services. OLTL will also provide other updates related to state-directed payments, budget-related items, and personal care home and assisted living issues.

**1:30 pm - 2:30 pm**

**36-B PDPM 2.0 Booster: Achieving Increased Per Diems Through Excellent Clinical Care**

*Melissa Brown*

*Finance*

With the pandemic largely behind us, providers are turning their attention to best clinical practices under PDPM that can increase per diem rates from $10-$50 per day. Learn about high-level effective strategies leveraged by successful SNF providers during 2021 and 2022 to increase the accuracy of PDPM rates, and impact daily per diems. Understand how your organization can leverage these strategies to improve your PDPM accuracy and reimbursement and support the ongoing needs of your community. Finally, learn about a unique wage index assessment of PDPM category rates that will help you identify key areas of opportunity in your community that may be previously untapped.

**1:30 pm - 2:30 pm**

**45-B A Guide To Successful Blue Sky Selling and Repositioning: Case Studies and Stats**

*Derek Dujardin, Don Warfield, Cynthia Thurlow Cruver*

*Marketing, Operations, Sales*

Calling all blue sky thinkers! See national perspectives about the timing of a repositioning and 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 are remodeled, as well as how to build a waitlist for future residents. 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 its repositioning and expansion projects.

**1:30 pm - 2:30 pm**

**51-B Technology 360: IT Strategy, Compliance, Operations**

*Daniel Cavolo*

*Finance, Governance, Operations*

The presentation is segmented into three topics. Each segment leads into the next segment to help organizations better understand how to proactively manage technology. This presentation will empower organizations to take control of IT and help strengthen the IT foundation to support future IT initiatives - EMR, accounting systems, human resources, smart living, nurse call, eCall, wander management, financial systems, phone systems, mobile technology, and more.

This presentation will outline how organizations can rate current technology systems, rate technology usage, manage IT vendors, and prepare for future initiatives. We will also review the methodology to ensure continuous education for staff, and discuss how organizations manage their IT operational and IT capital budgets using examples in the industry.

The first topic is IT strategic initiatives. The presentation will also identify methods for qualifying strategic initiatives and prioritizing future projects. We will discuss how organizations can leverage multiple technology project budgets to save on the overall capital and operational costs for all projects in process, and outline strategies to take organizations from manual processes to automation while implementing state of the art reporting tools.

The second topic is IT compliance. The presentation will discuss methodologies for creating and managing a compliance culture and provide examples of what evaluation criteria should be used to maintain compliance. We will discuss how compliance is related to each project and how to change the culture to think security first at all times.

The third topic is IT operations. Once a project is closed, the new IT solution must be supported every day and 100% used by staff. This section outlines methodologies for management to lead their IT support teams to ensure technology is effectively used at all times. The presentation outlines steps to move from a “reactive” support culture to a “proactive” support culture. We will discuss how management can leverage reporting and metrics to help staff increase system utilization. Further, we will discuss key performance indicators and how to leverage existing systems to centralize all reporting data.

**3:00 pm - 4:00 pm**

**03-C The Great Outdoors: Activating the Outdoor Environment in Senior Living Communities**

*Dan King, Margaret Kimbell, Jonathan Jolley*

*Operations*

Virtually everyone agrees that getting outside is important, and has both physical and mental health benefits. We all enjoy feeling the sun on our face, a light breeze that brings the scent of flowers, and the lyrical sound of birds. Senior living communities, particularly with more available acreage than others, have access to outdoor areas that are either underutilized or not designed in a way that is attractive or safe for an aging population.

The reasons for underutilization are myriad and relate to design, maintenance, operational concerns, and the overall culture of the community. With the rise of construction costs and restrictions to available space, looking to the outdoors for additional gathering and activity space is a viable solution to fostering socialization and community among the residents. Spending time outdoors is also one of the safest places to be during this era of the COVID-19 pandemic.

There is clear evidence that people are at lower risk of infection when spending time outdoors, practicing social distancing, and wearing masks, than when following the same precautions indoors. The movement of fresh air dramatically dissipates the density of the number of particles, reducing the risk of infection. Additional benefits include:

 • Just 10 to 20 minutes a day of exposure to sunlight boosts vitamin D which can protect against osteoporosis, some types of cancer, and heart disease

• Taking a break in nature can improve memory and cognitive function

• Spending time among plants and trees can boost immunity by lowering cortisol (a stress hormone), pulse rate, and blood pressure

• Getting outside improves sleep, mood, and energy

• Taking a walk in nature lowers depression, a known challenge among the elderly

**3:00 pm - 4:00 pm**

**10-C Lessons Learned from an Expert Nurse Witness**

*Mary Knapp*

*Clinical, Operations*

This session will focus on what I have learned as a legal nurse and administrative expert since 1985. Myths such as "If it isn't documented, it wasn't done" will be discussed in detail. Policies such as taking pictures of wounds and care plans will be presented. Standards of care will be defined and case studies will be presented with small group interactions in response to the plaintiff's claims.

**3:00 pm - 4:00 pm**

**19-C Creating Momentum Towards Workplace Citizenship to Strengthen Employee Retention and Engagement**

*Bruce Berlin*

*Operations, Workforce*

Thirty years ago, the “culture change” movement began to overcome the three plagues of people living in nursing homes - helplessness, loneliness, and boredom. The philosophies of resident care during this movement evolved over time from person-centered, where residents’ preferences formed the basis of care provided by staff, to person-directed, where residents made their own decisions about their individual routines.

The foundation for these “culture change” models is the 7 Domains of Well-Being, which guides staff to develop holistic growth and wellness plans for each resident, based upon their individual strengths, to optimize their living experiences and well-being. The residents living in communities that have successfully implemented “culture change” have experienced significant improvement in their quality of life and well-being.

Today, these same three plagues exist with staff working in senior communities, resulting in sharp increases in employee disengagement, which is negatively impacting productivity and retention. Helplessness, by not being properly equipped to be successful in their jobs, being overwhelmed with tasks, and not being involved in decision-making on the work they do and how they do it. Loneliness, by not being known or feeling valued by co-workers and supervisors, or feeling a sense of belonging due to the lack of social interactions and relationship-building opportunities in their community. And boredom, by not learning new skills, seeing a career path or believing they are engaged in meaningful work.

Over the past 30 years workplace cultures have also evolved with more focus on employee engagement, where employees’ preferences formed the basis of the work environment created by leaders. Unfortunately, in focusing on employee engagement, many leaders have neglected to give attention to the employees’ experiences and their well-being.

Today, over 70% of employees are not fully engaged. At best, this group concentrates on tasks instead of outcomes, want to be told what to do, and puts forth minimal effort. At worse, they are unproductive, sow seeds of negativity, and sabotage progress. To be fully engaged, employees need to be fully committed to their organization.

In her book, “Disrupting the Status Quo of Senior Living,” Christian Living Communities CEO, Jill Vitale-Aussem, suggests taking “culture change” a step further by reframing residents as “citizens” and taking a deeper look into what they need to live long and healthy lives. As citizens of their community, residents are active participants, as fully engaged and empowered problem solvers who have an influence on their community and share responsibility in caring and supporting each other.

By adopting this same “citizenship” philosophy with their staff, leaders will greatly improve their employees’ work experience, and levels of engagement and commitment, which will lead to significant improvements in productivity, resident and employee satisfaction, resident outcomes, and operating margins.

In this session, participants will learn how to become Shepherd Leaders and implement practices based on the 7 Domains of Well-Being model to meet the five critical needs of their employees (being properly equipped, having a sense of belonging, being valued, engaging in meaningful work, and having opportunities to grow), greatly enhance their workplace experience, and generate momentum towards creating a path to workplace citizenship.

**3:00 pm - 4:00 pm**

**28-C PA Dept. of Health Division of Nursing Care Facilities Update**

*Susan Williamson*

*Operations*

The session will cover updates from the Department of Health Division of Nursing Care Facilities. Updates will include trends and citations noted by surveyors and helpful reminders. The recent implementation of CMS policies, such as the vaccine mandate and the ongoing focus on infection control, will offer plenty of content for this DOH presentation, trends, and updates.

The presentation will be useful for all levels of staff within nursing facilities to better understand best practices, survey citations over time, and ways surveyors have supported facilities in implementing corrective action plans to meet regulatory compliance and improve quality of care and services.

**3:00 pm - 4:00 pm**

**37-C Waste Nothing**

*Kate Munson, Chris Greve, Laura Roy*

*Finance, Operations*

Why strive to Waste Nothing? Food waste is a massive global challenge and since even a mid-size senior living community will approach a quarter of a million meals per year or more, there is a responsibility to work towards positive change.

Additionally, the core value of good stewardship many nonprofit organizations embrace, along with the necessity to practice lean processes for fiscal health, can be impacted positively and significantly. The Waste Nothing approach helps our teams first become aware of the food waste produced in their kitchens, and then offers guidance on ways to reduce, rescue, and redirect it from the landfill.

• $218 billion spent in the U.S. on food never eaten

• 63 million tons of U.S. waste annually, with 5 million tons being food waste

• 85% of unused food in restaurants becomes waste

**3:00 pm - 4:00 pm**

**46-C How “Internalized Ageism” Impacts Sales, Marketing, and Census (And What You Can Do About It!)**

*Cynthia Thurlow, Derek Dujardin, Don Warfield*

*Marketing, Sales*

We all know that 92-year-old who tours a community and says, “I can’t live with all these old people!” and leaves.

That biased mindset is part of a deeply rooted psychological construct known as “internalized ageism,” and it presents a considerable hurdle when marketing to the mature market.

In this eye-opening presentation, 3rdThird Marketing (a division of 3rdPlus) will help you better understand the psychological triggers behind internalized ageism and how it shapes perceptions. The presentation includes real-world examples of what kinds of key messages to use and those to avoid, along with both subtle and overt cues in architecture, dining, design, language, images, events, offers, etc.

In addition, you’ll learn how to refocus prospects on positive associations of communal living and how to evaluate your own marketing and selling via the lens of internalized ageism to make it more effective—presented.

**3:00 pm - 4:00 pm**

**52-C What To Do in 2022 to Fight Phishing, Ransomware, and Other Things That Go Bump in the Night**

*Jeremy Wheeler*

*Finance, Operations*

As the connected world continues to permeate our everyday lives, the risks to our organizations’ and residents’ data continue to mount. Ransomware attacks are on the rise. The number of phishing attacks grew last year at an alarming rate. Cyber insurance due care standards is starting to escalate. Learn what the bad guys are after, and how you can avoid becoming a victim.

**4:15 pm - 5:15 pm**

**GS-2 Think Again: The Power of Knowing What You Don’t Know**

*Adam Grant*

*Operations, Workforce*

The past year has led us to rethink fundamental assumptions—where to work, how to manage remote culture and collaboration, whether to reimagine our strategy and our products or services. Yet too many leaders and employees are reacting to events instead of proactively looking for opportunities to think again.

Organizational psychologist Adam Grant has spent the past decade studying this problem at organizations ranging from the NBA to Pixar to NASA, and he finds that the very skills that make us good at thinking and learning can make us worse at rethinking and unlearning. Building on his new book, Think Again— which has been called “brilliant” by Nobel Prize winner Daniel Kahneman—Adam examines how we can update our own opinions, open other people’s minds, and build a learning organization in which people know what they don’t know and are eager to improve on the status quo. His eye-opening evidence and entertaining delivery will leave you determined to never again say “that’s the way we’ve always done it.”

**7:30 pm - 9:00 pm**

**FOA-2 Still Alice**

Dr. Alice Howland is a professor at Columbia University, who must come face-to-face with a devastating diagnosis of early-onset Alzheimer's disease. This film presents the struggles Alice experiences while trying to hang onto her sense of self for as long as possible and how impactful this is for her family who must watch helplessly as Alice forgets more and more with each passing day.

**Thursday**

**7:00 am - 8:00 am**

**FOA-3 Monster in the Mind**

Jean Carper, a former health journalist, explores the story of Alzheimer’s disease and the societal fears of the disease. Throughout the documentary, Carper interviews different researchers and discusses the different studies that have historically been done on Alzheimer’s and what is presently being done. What arises from the documentary is a surprisingly uplifting vision that can help save the doomful thoughts society holds on dementia.

**9:15 am - 10:15 am**

**GS-3 Political Outlook**

*Special Guest Keynote Speaker*

*Operation, Governance*

Our Thursday morning keynote speaker offers a comprehensive picture of the ever-changing political landscape. He interprets the most pressing issues facing the country today, including senior services, government funding of Medicare/Medicaid, and senior housing. He offers his insight and analysis into Washington politics and the current administration. A seasoned journalist and TV veteran, his unparalleled perspective on the media’s relationship with Washington and balanced scrutiny of politicians and current events gives audiences an entertaining and edifying experience they won’t soon forget.

**10:30 am - 11:30 am**

**04-D Industry Consolidation: Slowing Down or Speeding Up?**

*Lisa McCracken, Jim Petty*

*Operation, Finance*

This session will begin with Ziegler providing a national update on industry consolidation, with an included focus on Pennsylvania activity. Ziegler will present trends of sponsorship transitions, acquisitions, affiliations, and mergers in the nonprofit CCRC/Life Plan sector. This will include a review of transactions that have occurred over the past several years, particularly in Pennsylvania. An analysis of what motivated these transitions will be provided to the audience, as well as a discussion of trends that can be expected to continue in the year ahead. A specific review of the impact that COVID pressures have made on organizations, as well as CEO retirements, to the consolidation movement will be presented.

The session will transition to a provider in Pennsylvania that has grown specifically through the affiliation strategy. Acts Retirement-Life Communities, Inc. will present their historic growth, the organizations they have added through affiliation, and the criteria that are used to evaluate opportunities. This will include a review of diverse transactions, including organizations motivated by financial challenges, bankruptcy, strong but strategically motivated transitions, and CEO retirements. This will lead to a review of the most recent activity within Acts: the Strategic Alliance agreement with Willow Valley Communities. This summary review will provide the audience with an understanding of the components of the Strategic Alliance, the customized approach in crafting the agreement, and the strategy being pursued to strengthen both organizations. The session will review what considerations should be of priority when considering joining another organization. It will provide the audience with strategies if their organization is considering either joining a larger one or growing as the affiliator of other communities.

The session will conclude with some assumptions on future trends of these types of transactions. National and state pressures, as well as the changing landscape and strategies within the sector, will provide insight into the sponsorship transition activity that can be expected in the year ahead.

**10:30 am - 11:30 am**

**11-D Telemedicine and Telehealth in Aging Services: Keys to Success**

*Jean Harpel, Victor Rose, Beth Cwiklinski*

*Clinical, Operations*

Telehealth and telemedicine have reached new heights since the start of the COVID-19 pandemic. Some legal and regulatory barriers were removed during the pandemic, making way for these virtual care models to flourish and proliferate, creating opportunities for aging services providers to harness the wave.

The primary goal, at first, was to reduce the risk of transmission of COVID-19 between residents who would otherwise use in-person physician services. However, now telemedicine is also helping to reduce in-person patient volumes and give persons served the means to receive patient care in their homes.

Are these changes here to stay? Across the past decade, advances in medical technology, changes in reimbursement structures, and the growing need for innovative care delivery models have initiated a shift in the health care industry. Providers in long-term care and senior services need to find ways to implement telehealth and telemedicine in their own facilities efficiently, and with an eye toward quality. But providers also need to be aware of the risks and liability issues associated with virtual health care.

This session will discuss the differences between telehealth and telemedicine, and explain how the use of both virtual health care models has emerged and how this will impact organizations going forward.

**10:30 am - 11:30 am**

**20-D Someone Just for Me: Recognizing a Critical Role for Volunteers**

*Paul Falkowski*

*Assisted Living/Personal Care, Workforce*

Creating and sustaining intimate relationships takes time and commitment. In this session, you will learn the critical components for creating “authentic” relationships. You will learn how to recruit, screen for, and train a cadre of volunteers, who go on to become “companions” or, as one older woman observed, “…someone that is here just for me.” We’ll look at the transformational power volunteers like these can have on the people you serve, the people serving them, the volunteers themselves, and your surrounding community.

**10:30 am - 11:30 am**

**29-D Risk Management Strategies for Providers Navigating the COVID Pandemic**

*Collin Keyser, Tanya Daniels Harris, C. Lynn Ruppersberger-Swisher*

*Governance, Operations, Workforce*

Long-term care providers have faced unprecedented challenges since the onset of the COVID-19 pandemic that have created an environment for increased liability risk. Providers have been confronted with numerous changes in state and federal guidance while struggling to address staffing shortages and access to personal protective equipment.

For example, in November of 2021, the Centers for Medicare & Medicaid Services (CMS) released an interim final rule mandating the COVID-19 vaccination for staff at health care facilities that participate in the Medicare and Medicaid programs, which includes long-term care nursing facilities. The CMS vaccine mandate, as well as the Pennsylvania Department of Health’s proposed rule to increase the minimum number of direct resident care hours from 2.7 to 4.1, will significantly impact long-term care nursing facilities, especially in light of the national staffing shortage that already exists.

If staffing issues weren’t enough, long-term care providers are also faced with the challenges of developing and implementing infection control policies and procedures, complying with CMS’ long-term care facility testing requirements, and reporting COVID-19 data and vaccination data through the NHSN system - all while trying to ensure the health and safety of residents.

This session will address the potential liability risks confronting long-term care providers during the pandemic, and recommendations on how to manage those risks now and in the future. The presenters will discuss the most frequently cited deficiencies arising during the pandemic and best practices to ensure compliance and avoid an adverse event. The presenters will also address strategies to respond to an adverse event and successfully defend a claim.

**10:30 am - 11:30 am**

**38-D Best Practices for Survey Survival**

*Paula Sanders*

*Operations*

Communities across the country are finding themselves under increasing scrutiny from federal and state surveyors. More providers than ever before are getting cited and fined as regulations and sub-regulatory guidance continues to be ambiguous and subject to inconsistent or even contradictory interpretations. Staffing challenges further complicate operational excellence.

It is becoming more common for 4- and 5-Star facilities to receive deficiencies at the Immediate Jeopardy and Actual Harm levels. Providers who have never found themselves in such a situation frequently struggle with how best to respond during the survey, and as a result they miss potential opportunities to mitigate negative outcomes.

Communities’ boards of directors should be educated about the changes in enforcement activity so there is a better understanding beforehand about how the environment in 2022 is so markedly different from 2020. Boards that are more informed are often more supportive when adverse survey events occur than those boards that are unaware that the status quo no longer exists.

This session is designed to provide strategies for both operational and institutional improvements. We will discuss the heightened expectations for increased sanctions and citations, and identify ways in which communities can prepare themselves and their staff. We will also provide ideas for how to improve documentation of training and competencies, including the training of agency and PRN staff. Managing board expectations is also something senior leadership should be considering as the possibility of a negative survey is statistically becoming a “when, not if.”

LeadingAge PA members have always been extremely supportive of each other, and during this session, they will be encouraged to exchange experiences and best practices with each other. Their strength and resiliency help to create an atmosphere that is hopeful and optimistic, even in the face of surveyor antagonism and animosity. Through their shared commitment to quality, we can move the industry forward.

**10:30 am - 11:30 am**

**47-D Inspire Transformation: Shaping the Future of Senior Living**

*Janice Maloney, Vernon Feather, Carie Shingleton*

*Marketing*

Providers around the country are looking to reinvent their communities in anticipation of the next generation of seniors, while re-imagining life after the pandemic in a world with fewer staff.

This session will show examples of both incremental and bold transformations some providers have taken to prepare and transform their communities for the future. We will discuss how organizations are managing constraints and limitations while implementing creative solutions.

**10:30 am - 11:30 am**

**53-D Innovation and Strategic Partnerships: Assessing Readiness**

*Jennifer Schwalm, Brandon Harlan, Chris Wright, Brian Picchini*

*Assisted Living/Personal Care, Governance, Operations*

Today’s world has highlighted the need for alignment with partners to help accomplish our primary goals or to help innovate – this may be personal goals (e.g., identifying a mentor or coach to help achieve growth goals) or organizational goals (e.g., identifying a partner to supplement service offerings or assist with specific initiatives).

Innovation is also driving our thinking about new or different ways of meeting our customers’ needs. While there is a spectrum of arrangements that can be contemplated on the risk/investment scale, this session intends to focus on those outsides of a “vendor relationship” that includes identifying those partnerships that will require investment in collaboration and trust.

Organizations enter partnerships for various reasons – access to capital or other resources, obtain efficiencies, succession planning, etc. However, there are many facets to a board’s role in evaluating and pursuing a partnership.

Initially, a board needs to understand what the organization is looking to achieve through this partnership and whether there is a common alignment of vision. Another element is whether the organization is ready to partner. This includes assessing external readiness and internal readiness. An external readiness assessment is understanding the impact of a partnership to the organization’s key stakeholders – residents, family members, referral sources, donors, competitors, etc. Just as important is considering whether the team internally is prepared to collaborate. While the opportunity to partner is often identified and pursued by senior leaders and the board, the lack of resources and capacity could be one of the barriers to success. Once an organization identifies its readiness, all engaged parties must come to a consensus on a common vision, goals, and outcomes to ultimately define a working structure. Finally, once a partnership is formed, there should be a continued focus on evaluating and measuring the success factors, tension points for the long-term success of the partnership, and celebrating successes.

This presentation will outline key steps in assessing readiness, introduce the process for strategic partnerships from start to finish, and engage with at least one provider. The providers will share key elements contemplated by their respective management and board in assessing readiness for strategic partnerships.

**1:30 pm - 4:00 pm**

**05-E The Active Shooter in the Long-Term Care Facility: Planning For, Responding To, and Recovering From the Unthinkable**

*Steven Wilder*

*Operations*

An active shooter in a long-term care facility is something none of us want to imagine possible. Yet it can…and has…happened! Steve Wilder, a nationally recognized long term care security consultant will examine the different types of active shooter events and step that can be taken to plan for, respond to, and recover from the unthinkable. Mr. Wilder will provide a template and guide you through developing a custom active shooter program for your community, discuss how to complete security vulnerability assessments, and more during this interactive session.

**1:30 pm - 2:30 pm**

**12-E Palliative Care for Aging Communities in 2021: Build, Buy, or Partner**

*Katy Lanz*

*Assisted Living/Personal Care,*

*Clinical*

Aging communities in the U.S. are demanding more choice and more value in their health care experiences. Palliative Care was one of the first to the table in the value-based arena and has proven its effectiveness in helping people through the last years of life make choices and prepare for how they want to live in the event they get sicker. COVID has thrust us into an awareness of our mortality and senior communities are in need of support to help their residents facing serious illnesses feel comfortable and confident about their disease, and how to manage it in the event they get sicker.

In this session the learner will hear from leading experts in our country regarding palliative care initiatives in the community setting. The panel will review what palliative care looks like in America today and how it is being paid for. They will highlight how one might build or work with others to create services in various settings and discuss options and resources that are effective and growing.

**1:30 pm - 2:30 pm**

**21-E Promoting Team Effectiveness: Building Communication and Motivation**

*Lauren D'Innocenzo*

*Workforce*

"Coming together is a beginning. Keeping together is progress. Working together is success." -Henry Ford

Do you know what motivates your teams? More than ever, teams are necessary to meet organizational objectives but keeping your teams engaged can sometimes feel like an uphill battle. Having appropriate mechanisms and a thoughtful strategy in place can help leaders navigate the often-dreaded task of people management. In this session, we will examine some of the foundational elements of motivation and explore key strategies to increase engagement in your teams.

**1:30 pm - 2:30 pm**

**30-E Medicare Advantage is Not Going Away! What Are You Doing About It?**

*Alisa Miller, Charles Maines, Vicki Loucks*

*Operations*

Every day 10,000 individuals turn 65 and gain eligibility for Medicare. According to the U.S. Census Bureau, the number of Americans over the age 65 is projected to double over the next four decades, growing from 56 million today to about 95 million by 2060.

Medicare Advantage is projected to be the dominant form of Medicare within the decade. Medicare Advantage is leading the innovative use of value-based care — delivering better health outcomes, through better quality care at a better cost for Medicare beneficiaries.

Medicare Advantage is the public-private partnership in Medicare where 27 million individuals 65 plus receive coverage today.

Medicare Advantage will continue to evolve, but it is here to stay! This presentation will summarize the current national and state trends related to Medicare Advantage. The presentation will identify the critical aspects of Medicare Advantage organizations need to understand.

More Medicare Advantage beneficiaries are enrolling in Special Needs Plans (SNPs), which are Medicare Advantage plans for beneficiaries already enrolled in Medicare Advantage. SNPs focus on beneficiaries with certain chronic conditions, are institutionalized, or are dually eligible for both Medicare and Medicaid. Individuals with End-Stage Renal Disease are also eligible to enroll in Medicare Advantage as of 2021.

Special Needs Plans (SNPs) are a specialized type of Medicare Advantage plan designed to serve the health care system’s fastest-growing population – frail, disabled, and chronically-ill individuals.

1. Over four million Traditional Fee-For-Service (FFS) Medicare beneficiaries in 2014 had six or more chronic conditions, representing 51% of FFS Medicare spending.

2. SNPs enable Medicare Advantage plans to target care to high-risk beneficiaries. SNP Medicare Advantage plans tailor care to the needs of a targeted population with complex conditions. SNPs are designed to manage and treat beneficiaries through approved Models of Care. The program aligns incentives and contains costs by emphasizing primary care, chronic care management, and integrated health care services.

A case study presented by a LeadingAge PA member will review their decision to launch a special needs plan and the impact on their organization.

**1:30 pm - 2:30 pm**

**39-E Don’t Become a Defendant to a Lawsuit: Protect Your Facility from Financial Damage**

*Andrew Eisemann, Daniel Natirboff, Bruce Baron, Edward Bonett*

*Finance, Governance*

Lawsuits are a major, yet often avoidable, expense for nursing facilities. Court costs, attorney fees, and wasted staff hours can add up quickly and jeopardize your financial viability. A nursing facility can protect its bottom line by taking preventative measures to avoid lawsuits.

In this panel, four 15-minute case studies will be presented, teaching facility staff what they can do to avoid being hit with a similar lawsuit. Each case study will cover a different legal area:

Bruce G. Baron, Esq.: “The Importance of Maintaining Good Documentation Procedures”

Daniel K. Natirboff, Esq.: “Protect your Facility from Enforcement and Criminal Prosecutions”

Andrew R. Eisemann, Esq.: “Avoid Disputes with Vendors and Malpractice Actions” and “What you need to know about Arbitration Agreements”

While the five experts present, audience questions will be collected. The panel will spend the last 30 minutes reading and discussing the audience’s submitted questions.

**1:30 pm - 2:30 pm**

**48-E Out with the Old, In with the New: Adapting Sales Approaches to Modern Marketing**

*Kimberly Hulett, Jessica Ruhle*

*Marketing, Sales*

In Partnership with LeadingAge PA we conducted a survey of senior living providers in 2021 that revealed that most communities will be investing in digital marketing more than they have in the past. It was also discovered that most communities were not yet investing in modern sales techniques and expected a decline in support materials and services budget. With more marketing dollars invested in digital avenues, more leads will come in digitally. Is your sales team ready?

During this presentation, we will demonstrate the need to modernize your community’s sales techniques with varied approaches, including automation approaches to complement traditional touches. We will explain how digital and enhanced selling tools can successfully shorten the customer journey to sale – and free up immediate lead follow-up time from the sales team. Attendees will be presented a case study on how the PA-based senior living system, Phoebe Ministries, successfully leverages enhanced selling tools and we’ll make recommendations on digital marketing messaging and enhanced sales tactics to ensure your message is reaching the right people at the right time, and your sales team’s outreach complements it.

**1:30 pm - 2:30 pm**

**54-E Techniques to Engage Board and Leadership in Strategy**

*Diane Burfeindt*

*Governance, Operations*

Successful strategy during times of uncertainty requires leaders and their boards to engage, communicate, and collaborate in vastly different ways. Using techniques to develop highly collaborative conversations and shared learning has enabled providers to create strategies with a shared sense of ownership, which creates the foundation of lasting outcomes.

In this session, attendees will learn about the techniques used in organizations to align vision and values to strategy and the realities of daily operations, as well as the importance of igniting individual perspectives to create a truly engaged board. In an age of more frequent and faster communication, it will be even more imperative to invest in quality collaboration across the digital divide and in real life.

**3:00 pm - 4:00 pm**

**13-F Strategies to Manage Most Common Infection Control Citations**

*Patty Klinefelter*

*Clinical*

Nursing facilities must maintain a coordinated facility-wide program for surveillance, identification, prevention, control, and investigation of infectious and communicable diseases. Residents are at high risk of developing severe illnesses from COVID-19 and other infectious diseases.

This presentation will review the federal infection control regulations, most common MS citations related to infection control and prevention, and strategies to implement and maintain compliance with infection control standards.

**3:00 pm - 4:00 pm**

**22-F Generating Momentum to Enact Lasting Change**

*Bruce Berlin*

*Operations, Workforce*

The post-COVID economic landscape and staffing shortage is forcing all senior living organizations to make operational changes in order to provide quality care to residents and an engaging work experience for staff while maintaining sustainable operating margins. Because studies show that 70% of change initiatives fail, leaders must learn how to effectively plan for change and strategically align people and processes to generate momentum and create organizational change that will last. This will involve engaging frontline staff in the change process from beginning to end, and to overcome the resistance that comes with all change initiatives.

Based on William Bridges’ book, “Managing Transitions”, change is a shift in one’s situation and is defined by its outcome. Transition is the psychological reorientation one makes to come to terms with the change. For change to work, people must successfully navigate through a three-phase transition process:

1) Letting go of the old ways and the old identity people had

2) Going through an in-between time when the old is gone but the new isn’t fully operational

3) Coming out of the transition and making a new beginning

Leaders also need to create a five-step operational plan to engage their staff through the change and transition process:

1) Define the reasons for change (what and why)

2) Paint a compelling picture of what they are moving from and what they are moving towards (the benefits and how the changes impact them)

3) Show them how they are going to get there (the progressive steps to take and the support they will be given)

4) Collaborate on the implementation with them

5) Acknowledge and celebrate progress along the way (define metrics and celebrate successes)

**3:00 pm - 4:00 pm**

**31-F Regaining Momentum in the Business Office**

*Colleen Crist, Nick Miller*

*Finance*

Many organizations are adopting technology and automation to increase efficiency, save costs, and mitigate fraud. Join us to learn more about how embracing electronic payments can help your business office regain momentum.

**3:00 pm - 4:00 pm**

**40-F Successful Management of Home Care, Home Health, and Hospice Through National Benchmarks and Metrics**

*Michelle Bridges, Melinda Coley, Joan Punch*

*Clinical, Finance, Operations*

In this session, we will take an objective look at Home Care, Home Health, and Hospice lines of business for how to utilize operating metrics and benchmarks. Many CCRC’s are thinking about adding, or are already running some Home and Community-Based Services (HCBS) within their continuum of care. They are recognizing shifts in the health care landscape and understanding customers’ desire to have health care needs to be met in the place they call home.

This session will map key performance indicators which are paramount in successfully making home care, home health, and/or hospice an integral part of their care delivery model.

**3:00 pm - 4:00 pm**

**49-F Top 5 Digital Strategies That Are Generating Leads Now**

*Stephanie Jones, Jeff Felton*

*Marketing, Sales*

With a much lower cost per acquisition than traditional marketing channels and with more consumers going online for their research and answers to their inquiries, your digital marketing efforts need to align with current trends in lead generation. In this session, we’ll look at how best to utilize your digital assets to be visible and engaging to both searchers and search engines.

1. Branding: What Makes Your Community Better, Different, and Special

2. Offering Relevant Resources to Searchers

3. Focusing Content On Core Services and Living Options

4. Landing Pages That Connect

5. Technical SEO: Becoming Web Core Vitals Compliant

**3:00 pm - 4:00 pm**

**55-F Advancing Your Single-Site Organization Through Partnerships**

*Amy Castleberry, Steve Lindsey*

*Operations*

The pandemic has increased nonprofit senior living affiliation activity in Pennsylvania and across the country. Still, many single-site Life Plan Communities remain committed to autonomy as they pursue growth and mission advancement. How can single-site organizations gain the benefits of a multi-site scale while maintaining their independence?

This session will highlight the different ways that organizations are partnering with each other in structures that don’t include a formal affiliation and change of control. Attendees will understand the framework that various partnerships take and gain exposure to the wide range of ventures happening nationwide.

Attendees will learn the corporate, financial, and operating steps that enable a range of alliances, partnerships, and joint ventures. Senior leaders from The Colligo Group, a new venture formed among six nonprofit senior living organizations in Pennsylvania and Virginia, will describe how these organizations have come together to form a robust collaboration to solve shared industry and operational challenges. C-Suite managers will take with them an understanding of how to advance relationships beyond conversations to beneficial partnerships that maintain the identity of single-site organizations.

**4:15 pm - 5:15 pm**

**GS-4 Overcome: Crush Adversity with the Leadership Techniques of America's Toughest Warriors**

*Jason Redman*

*Operations, Workforce*

Adversity can often catch you by surprise and leave you struggling with what to do next. What if you could confront any adversity, from the biggest challenges, to normal daily challenges and not just survive it, but thrive afterwards?

Redman was horrifically wounded in Iraq in 2007 when he was shot at close range through the face and arm. After 40 surgeries, including extensive facial reconstruction and skin grafts, he came back from this experience stronger than ever - despite carrying scars and injuries he will have for the rest of his life. Redman went on to launch two successful companies and speaks all over the country on how to build better leaders through his Overcome mindset.

Redman teaches:

How to survive any life ambush

How to move from defense to offense using the proactive techniques of SEAL teams

How to strengthen your endurance during long-term trials

How to rediscover and thrive in your life purpose

How to lead your team (whether in business or family) to success

How to compete with the top 1% in your field

How to stay the course even when you want to quit

Some people move through adversity and others fall underneath it. Learn how you can be counted among those who will Overcome.

**Friday**

**9:00 am - 11:15 am**

**06-G Coaching: An Approach to Developing and Retaining Members of Your Team**

*Jeremy Kauffman*

*Workforce*

The pressure to retain our employees continues to mount. Large numbers of the workforce are leaving organizations for better opportunities, more flexibility, better work life balance, and higher pay. Studies continue to show that developing an engaged workforce produces better outcomes and motivates people to stay in their current jobs. A strategy that is often overlooked in improving engagement and retention is utilizing coaching with team members. Coaching is not the same as managing and requires different skills and a reset of the way managers relate to people. While many managers may feel they are coaching their team members, research shows that most managers are not effective coaches.

This hands-on session allows participants to learn from experienced coach, Jeremy Kauffman, and from one another through guided, small group discussions. The input garnered will be utilized by LeadingAge PA staff and speaker, Jeremy Kauffman to develop future training and resources that participants and other members can take advantage of to strengthen their workforce.

**9:00 am - 10:00 am**

**14-G QAPI for Infection Prevention in Aging Services**

*Hillary Hei, Celena Romero*

*Clinical, Operations*

To prevent the 2.4 million infections that skilled nursing facilities see each year, a Quality Assurance and Performance Improvement (QAPI) program for infection prevention must include continuous monitoring of the program. Preventing infections demands thorough analysis of collected data to discover the root causes, timely implementation of performance improvement projects, and a multidisciplinary approach to interventions that will engage staff. IPC leaders need to be prepared with the right tools to decrease infection rates, evaluate the IPC program systematically, and create a culture of safety that empowers staff to consistently perform IPC practices.

This session will review best practices and evidence-based research for QAPI processes that can improve infection rates and resident outcomes.

**9:00 am - 10:00 am**

**23-G LeadingAge PA Policy and Advocacy: What’s New, Now, and Next?**

*Charles Quinnan, Austin Cawley, Emily Kendall, Georgia Goodman*

*Operations*

Our team works with the Pennsylvania General Assembly and administrative policymakers to ensure our members’ voice is heard while influencing decision-making when it matters most. We research legislation and regulations, monitor introduced and moving bills, attend hearings, work with coalitions to coordinate joint efforts, and educate policymakers and the public.

This session will cover advocacy basics, including a peer-to-peer appeal for attendees and organizations to step outside of their comfort zones and begin building relationships with their local elected officials. To foster those relationships, attendees need to have a basic understanding of the legislative process, including the committee process, legislative timelines, and how to establish and limit expectations/goals. Additionally, while this session will be non-political in nature, there are current political realities that we as providers need to acknowledge and recognize. Understanding the political climate and how that intersects with the legislative process is key to developing successful relationships and ultimately successful advocacy campaigns.

We will explore policy, legislative, and regulatory priorities describing why each is important to LeadingAge PA members and the courses we are mapping to influence the legislative and regulatory process. Our advocacy and analysis are stronger with the engagement of our members. A quick review of the importance of political engagement and advocacy will prime attendees to develop and execute their own advocacy strategies with the help of the LeadingAge PA staff.

**9:00 am - 10:00 am**

**32-G Shine A Light on Me: Innovating Programs and Design to Spotlight Memory Care Resident Experience**

*Kristin Novak, Regina Farrell, Rebecca Anhorn, Margaret Yu*

*Assisted Living/Personal Care, Operations*

As the current and projected need for memory support in Life Plan Communities soars, designers and providers must collaborate to create design-forward spaces that support highly innovative programming. Speakers from Pennsylvania's Meadowood Senior Living and RLPS Architects will join forces to present a modern approach to memory support that puts the spotlight on resident experience through:

Connection to Nature: Presenters will explore how intentionally designed and programmed courtyard-centered plans can create resident-driven outdoor engagement in safe, fence-free spaces. These 'outdoor rooms' become an extension of the indoor living environment, while infusing otherwise dark interior spaces with daylight. Participants will see examples of vibrant, diversely programmed courtyards with a greenhouse, raised gardens, barbecue areas, and more – all to accommodate both active and passive resident engagement in barrier-free outdoor areas.

Presenters will demonstrate how courtyards create multi-directional exposure to daylight within interior spaces - promoting natural orientation to time of day and seasons, thereby eliminating the need for artificial circadian lighting.

Homelike Environment: Presenters will explore how to incorporate public versus private 'zoning' into memory care plans. Speakers will show how design techniques in volume hierarchy, color, interior finishes, and artwork can reinforce the public/private concept to create a homelike environment that cues residents to restful calm spaces versus active, energized ones.

Presenters will show how carefully-embedded interior finish selections create design-forward wayfinding, eliminating the need for overt signage, further reinforcing the homelike setting.

Likewise, service, care base, and utility doors are discreetly oriented away from resident circulation, as well as other staff spaces, to curate an environment that aligns with home versus institution.

Resident Engagement: Presenters will share ideas for interactive programming elements to allow people living with dementia to independently navigate their homes and choose how they want to spend their day. Specific concepts including life engagement stations, interactive wall art, dry-erase art tables, and activity spaces designed to accommodate unique projection technology will be shared.

**9:00 am - 10:00 am**

**41-G 5 Easy Ways to Implement or Improve Your Digital Marketing for Senior Living**

*Ryan Beardsley, Matthew Ulmer*

*Marketing, Sales*

Though it’s become a cliched statement, the onset of the COVID-19 pandemic has forced the senior living industry to change the way it markets to prospects. Many organizations began implementing digital strategies at varying levels before the pandemic, but given an older audience, it may not have been a priority for many as they face staffing and budget limitations. The pandemic has propelled the need for such efforts, but many organizations find themselves facing the challenge of what and how to implement.

This presentation will outline five simple digital strategies a senior living sales and marketing team of any size can implement into their prospecting strategy. We’ll explore strategies across several levels of budget capabilities, as well as opportunities to disperse responsibilities among staff members, whether the organization has the luxury of having a specific staff member focused on digital marketing or existing staff members are adopting the responsibilities.

We’ll talk about the power of organic content and how it can bring more visitors to a website, along with the power of a multi-channel approach to sharing that content. We’ll dive into simple online paid advertising techniques, such as paid search, that can offer a cost-effective cost-per-conversion, even on a modest budget. Social media platforms (especially Facebook and Instagram), are still very viable methods of marketing to prospects and advancing the brand in subtle ways, both through organic content and display advertising opportunities.

We’ll also look at simple automation methods for nurturing leads that are obtained, including how to better segment those leads based on engagement, interests, and other information obtained. Finally, we’ll discuss ways sales and marketing team members can interact with prospects in digital ways, focusing on the ones proving most effective today.

**10:15 am - 11:15 am**

**15-H The Positive Impact of Air Purification Technology on Clinical Outcomes in Multiple Healthcare Facilities**

*Kathryn Worrilow, Sue Schlener*

*Assisted Living/Personal Care, Operations*

Health care teams are driven to identify and reduce potential sources of illness and infections towards improved care. Many facility acquired infections (FAIs) originate from the air. Controlling these airborne pathogens is a priority for health care teams. An advanced air purification technology (AAPT) was designed to destroy the DNA and RNA of all bacteria, fungi, and viruses, rendering them non-infectious. The technology also comprehensively remediates volatile organic compounds (VOCs).

This study compares the biological, fungal, and VOC loading using the AAPT to standard high-efficiency particulate air (HEPA) filtration. It was hypothesized that the AAPT would be associated with reductions in airborne and surface pathogens, VOCs, and improved clinical metrics.

In two independent and IRB-approved studies, AAPT operated in a long-term care facility’s (LTCF) memory support floor and an acute care hospital’s medical-surgical floor (ACH-MSF). The AAPT was installed within each facility’s HVAC ductwork. The unit in the ACH-MSF provided comprehensive remediation of all airborne pathogens and the unit in the LTCF remediated all airborne pathogens and volatile organic compounds (VOCs). In the LTCF, two zones were studied on two floors: control floor with high-efficiency particulate air (HEPA) filtration and comprehensive AAPT remediation. In the ACH-MSF, three zones were retrospectively studied on two floors: control floor with HEPA filtration, mixed HEPA and AAPT remediation, and comprehensive AAPT remediation.

Statistical analyses were run on the hospital data to only include surgical patients (non-bariatric) admitted to any zone with a Case Mix Index (CMI) at discharge. CMI was used to adjust for the severity of illness. The LTCF data includes all residents in both zones. The control floor was used as the reference point for both installations.

In both facilities, the measured airborne and surface bacterial and airborne fungal levels, and VOC levels decreased as environmental purity increased. The ACH-MSF demonstrated a statistically significant decrease inpatient length of stay (39.5%), improved discharge metrics, and cost savings of 23%. The FAI rate in the LTCF decreased by 39.8% pre- to post-installation. Additionally, there was a 47% reduction in clinical staff call-outs in the LTCF.

The AAPT significantly reduced levels of infectious airborne and surface pathogens and VOC levels in both healthcare facilities thereby removing two common vectors of illness. These facilities experienced improved clinical and economic metrics. The comprehensive removal of airborne pathogens in healthcare settings has a direct impact on residents, patients, and staff. The findings support the hypothesis that environmental factors impact wellness. Aggressive management of airborne illnesses and nosocomial infections must involve methodology for resident, patient, surface, and air disinfection. Further research is warranted in this critical area of clinical investigation.

**10:15 am - 11:15 am**

**24-H 8 Simple Rules for Caring for Our Residents**

*Kevin Bean*

*Operation*

The 8 Simple Rules covers topics such as how to proper listening skills, body language, goal setting, attitude adjustment, caregiver burnout, and more. It is a series of lessons that, when followed, will help any caregiver provide better care through a holistic approach that recognizes our Residents as people- not jobs or objects. I will show during the course of this presentation how things we take for granted, like reading body language and showing Residents respect during care can quite literally save lives. Through a series of stories and lessons I’ve learned over the course of my career, I will help participants to refresh their approach to resident care.

**10:15 am - 11:15 am**

**33-H An Affordable Housing Mission: A Senior Care and Ministry Partnership**

*Deborah Seitz, Carol McKinley, Reverend Evelyn Kent Clark, Jackie Patterson*

*Assisted Living/Personal Care, Finance*

This is a case of a landowner and a senior care provider discovering their shared faith could lead them to a partnership that would sustain each of their missions. Both related to the United Methodist Church, The Garden Church in Lansdowne, Pa., wanted to spend more effort on their parishioners than on maintaining aging buildings, while Simpson was seeking land to build an affordable senior community.

The two organizations collaborated two separate times, 15 years apart, through a long-term land lease of the church’s urban one-acre site. On that site, Simpson constructed two apartment buildings that housed a new thrift shop and worship space for The Garden Church. Both projects utilized competitive tax credit funding.

In this session, learn how this partnership formed, garnered local and state support, financed the project, incorporated historic elements into the design, and met sustainability goals. The discussion will also include how both buildings were designed to incorporate the business as an outreach to the local community and a dignified worship space while creating privacy for the residents. Both missions were accomplished!

**10:15 am - 11:15 am**

**42-H Redefining Spaces: Creating a Program for Repositioning Apartments to Meet Consumer Preference**

*Rebecca Gardner, Margie Seagers, Kristin Hambleton,*

*Finance, Marketing, Operations, Sales*

With the changing demands of tomorrow’s residents, life plan communities with older buildings and outdated floorplans will be challenged to undergo a significant facelift to be a relevant choice and keep up with the competition. For a complete repositioning of apartments to be successful, there needs to be an intentional plan created with the buy-in of all necessary stakeholders.

 In this session, we explore what it takes to recreate outdated apartments into modern suites, and rapidly increase interest and occupancy. We will also review floor plan options, interior finishes trends, and a unique software system for managing the repositioning of your building.

**11:30 am - 12:30 pm**

**07-I ICHRA vs Traditional Health Insurance Plan**

*Rebecca Young, Frank Spinelli*

*Finance, Workforce*

We will share what an ICHRA health plan is - explain how it differs from traditional health insurance group plans. An ICHRA can open up the possibilities for employees and employers in taking control of their health insurance needs and costs. It will shift the responsibility of health risks to the employee and get employers out of the "business" of managing employee health risks. ICHRAs offer options and variety so that employees can purchase the plan the best suit their needs.

**11:30 am - 12:30 pm**

**16-I From Frailty to Functionality**

*Karen Welsh*

*Assisted Living/Personal Care, Clinical, Sales*

This presentation will cover the definition of frailty, how understanding frailty can help to better care for residents, and strategies to reduce rehospitalization and capture additional census.

“Frailty is most often defined as an aging-related syndrome of physiological decline, characterized by marked vulnerability to adverse health outcomes.” (Jeremy D Walston, MD, Uptodate.com)

The added vulnerability requires increased understanding of the needs of the frail population and how to plan for their care. A holistic, deficit-based approach rather than a diagnoses driven response is important in treating frailty. The first step in establishing a functional and effective plan of care is proper identification of the frail resident. There is general consensus as to what constitutes a frail resident and there are established screening tools available. After identification, the next step is understanding how frailty impacts the functional abilities of those residents.

There are additional factors that must be taken into consideration when working with the frail population. For example, frail residents with weakness cannot be treated the same as any other resident, as there may be many factors contributing to that weakness. A resident-centered multidisciplinary approach is more critical than for other clinical programs. Progress may be slow, especially initially and setbacks and exacerbations should be expected. Early identification of symptom worsening will be key to continuing forward progress.

A facility that offers an organized approach, with good outcomes and can admit residents sooner, will capture additional census opportunities. This will allow hospitals to discharge to post-acute earlier, decreasing overall costs associated with the episode of care. Well-trained staff, with a comprehensive approach to therapeutic interventions, will assist in reducing rehospitalizations for this population.

**11:30 am - 12:30 pm**

**25-I Turn the Tables: Make Your Five-Star Rating Work for You**

*Marianne Lake, Jon Hudak*

*Operations*

In this session, LeadingAge PA’s research team will demonstrate how to increase your Centers for Medicare and Medicaid Services(CMS) Nursing Home Five-Star Rating. Using a current LeadingAge PA Quarterly Five-Star Rating Report, we will do an in-depth analysis and explanation of each of the three domains: health inspections, staffing, and quality of resident care.

**11:30 am - 12:30 pm**

**34-I The Intersection Between Admission Agreements and the Collection Process**

*Steven Montresor, Dayna Mancuso*

*Finance, Operations, Sales*

The disruption to cash flow by delinquent accounts is an issue that can arise for senior living providers across the continuum of care. It is becoming increasingly common for residents to engage in both pre- and post-admission financial planning, utilizing such devices as annuities and trusts to protect assets. Additional issues, such as the inability or refusal of an agent under a power of attorney to meet their obligations as a responsible person, or worse, the misappropriation of assets by an agent, can lead to serious consequences for both the resident and the provider.

This session will review the ways senior living providers can enhance their ability to manage these issues throughout the continuum of care. Emphasis will be placed on Residency and Admission Agreement provisions, including obligations of responsible persons. The presenters will describe how the application and admission process can be used to identify assets, screen applicants, and ultimately collect a delinquent account.

Finally, the presenters will review possible grounds for litigation against residents, responsible persons and agents, and demonstrate how the admissions agreement and application can be used to pursue cases of non-payment. The relationship between the Admission Agreement and MA eligibility also will be addressed.

**11:30 am - 12:30 pm**

**43-I Strategies to Reshape Your Marketing Message for “Post” Pandemic World**

*Dan Gartlan*

*Marketing, Sales*

The pandemic has changed the conversation. Marketing and sales for senior services will need to add and reshape their messaging moving forward.

Participate in a discussion on the concerns, questions, and desires of today’s prospects and their families. Join Dan Gartlan of Stevens & Tate Marketing, a senior living innovator, in learning the principles of StoryBranding and how it can be used now to increase marketing results and improve lead generation for your community.

Learn how three leading Life Care Communities transformed their marketing after finding themselves with aging populations, increased competition, and messaging that engaged with their prospects.