



# ASSISTED LIVING PROGRAM MANAGER

APRIL 16, 2026  
AURORA TRAINING CENTER  
11159 AURORA AVE., URBANDALE

Sponsored by: HealthCARE of Iowa Your Senior Living Partner

## PROGRAM DESCRIPTION

Elevate your leadership with the Assisted Living Program Manager Training, designed for administrators, managers, and nurses to master the essentials of effective program management. This course meets the DIAL Rule 69.29(5) requirement, providing six hours of Iowa-specific training on assisted living rules and regulations for new program managers hired after January 1, 2010.

Gain the tools and knowledge to lead confidently and ensure compliance through a blend of an in-person session and on-demand modules, which must be completed before the in-person training on April 9. Successfully finish both components to earn your certificate and advance your career. Register today to enhance your expertise and excel in your leadership role!

## OBJECTIVES:

- Review the Assisted Living current rules, trends and updates.
- Explore nurse delegation and medication management in the ALP.
- Identify policies and procedures to incorporate into an emergency preparedness plan.
- Develop and maintain compliant, individualized service plans by accurately translating evaluation findings into clearly defined services and updating plans in response to tenant condition changes, supporting consistent and person-centered care delivery.
- Examine investigative processes that assisted living programs should implement for handling potential dependent adult abuse situations.
- Determine best practices for implementing proactive strategies to achieve compliance.
- Gain knowledge of Federal and State fair housing laws.
- Outline the required inspections for fire safety systems.
- Discuss terminology and clinical management of common disease processes that can occur in older adults, particularly in assisted living levels of care.
- Investigate outside services that provide support in an assisted living program.
- Understand how financial management fits into assisted living organizations.
- Recognize key trends for older adults entering assisted living communities.
- Describe strategies to ensure culinary staff are appropriately handling, preparing and serving food.
- Establish effective communication strategies to ensure clear and concise communication among team members.

## REGISTRATION INFORMATION

The LeadingAge Iowa Assisted Living Program Manager class is formatted to help attendees manage their time while still receiving quality training and networking with colleagues. The course is designed with a combination of one full day of in-person training as well as on-demand that recorded sessions that can be taken anytime/anywhere that internet access is available and must be completed prior to the in-person training on April 16.

Individual LAI Member Rate \$550

Individual Prospective Member Rate \$750

### What's Included

Registration fees include electronic handouts, access to on-demand content once registration is received, light continental breakfast, lunch, refreshments, CEU/attendance certificate and Assisted Living Program Manager Certificate. All attendees can start taking the on-demand, recorded sessions once registration for the course is completed. All on-demand recordings must be completed prior to the in-person training on April 16.

## CANCELLATION/REFUND POLICY

The online registration deadline is April 14, 2026. No-shows will be billed. Substitutions welcome any time prior to the in-person training as long as the on-demand recording portion has not been started. All cancellations and substitution requests must be emailed to Dawn Balder ([dbalder@LeadingAgeIowa.org](mailto:dbalder@LeadingAgeIowa.org)). A full refund will be given to all cancellations received 10 or more business days prior to the in-person as long as the on-demand recording portion has not been started. A \$100 administrative fee will be charged to all cancellations received six to nine business days prior to the live program. No refunds will be given to cancellations received five or fewer business days prior to the live program or after accessing the on-demand recording portion of the program. Refunds will be calculated by the date received and the LAI business days remaining prior to the program. LAI reserves the right to cancel the program due to insufficient enrollment, in which case pre-registered participants will be notified and full refunds provided.

## INTENDED FOR

Administrators, Assisted Living Managers, Assisted Living Nurses, Social Workers, and anyone needing to meet the requirements of DIAL rule 69.25(5).

## AREA HOTEL INFORMATION

LeadingAge Iowa has negotiated special sleeping room rates for its members at several area hotels. Go to [www.LeadingAgeIowa.org/Hotels](http://www.LeadingAgeIowa.org/Hotels) to view hotel options.

REGISTER AT

[WWW.LEADINGAGEIOWA.ORG/ALMANAGEROCTOBER](http://WWW.LEADINGAGEIOWA.ORG/ALMANAGEROCTOBER)

# AGENDA FOR IN-PERSON TRAINING

Attendance at the in-person training is required to complete the course.

April 16, 2026

8:30 a.m. - 12:30 p.m.*	<b>Assisted Living Administrative Rules, Trends and Updates (Catie Campbell, Department of Inspections, Appeals, and Licensing)</b> Knowing the regulations and understanding the monitoring process will assist in maintaining a focus on quality tenant services. A review of what to expect during this process and the documentation needed to be successful will be held.
12:30 - 1 p.m.	<b>Lunch (included)</b>
1 - 4:15 p.m. *	<b>Nurse Delegation and its Use in Assisted Living (Amy Skelton, Healthcare of Iowa)</b> Nurse delegation and its use in assisted living based on the state rules and nursing scope of practice plays an integral role in ensuring staff are trained and competent in providing care and service. This session provides attendees with the knowledge to use nurse delegation effectively and appropriately to ensure tenant safety is maintained.  <b>Medication Management (Amy Skelton, Healthcare of Iowa)</b> During this presentation, medication management will be discussed including educating attendees on possible high-risk medications that are common for older adults to be prescribed. This session will include an overview of possible adverse events that providers should be aware of and routinely monitoring with use of these medications.  <b>Evaluations and Service Plans (Amy Skelton, Healthcare of Iowa)</b> Service plans are nearly always among the highest cited regulatory insufficiencies in assisted living. Ensuring that all necessary services are included in the service plan, that they are based on the completed evaluations, and updated as needed are crucial to ensuring staff provide individualized tenant care and services.

\*A 15-minute break will be scheduled during the morning and afternoon session.

## ON-DEMAND RECORDED CONTENT

All on-demand recorded content will be accessible upon receipt of registration and must be completed before the in-person training on April 16.

### **Emergency Preparedness in Assisted Living (Kellie Van Ree, LeadingAge Iowa) 58 minutes**

Emergency preparedness planning is crucial to effectively and efficiently manage all types of disasters in health care settings. Great emergency preparedness plans include identifying potential hazards, determining the potentially most impactful hazards, and establishing best practices in response. This session will provide discuss what Iowa Administrative Rules require of assisted living programs and what best practices can be implemented including examples of hazard vulnerability analysis, training of staff, incident command, and testing developed plans.

### **Self Reporting - How to Investigate Issues in Assisted Living (Stacy Hejda, Healthcare of Iowa) 37 minutes**

Assisted living programs are required to complete incident reports for all accidents and unusual occurrences among tenants. The best practice following an incident is to investigate contributing factors, identifying the root cause, and providing preventive interventions to reduce incident reoccurrence. This session outlines common incidents in assisted living programs with investigative strategies to ensure program compliance.

## **Preparing & Responding to Survey (Stacy Hejda, Healthcare of Iowa) 104 minutes**

The Department of Inspections, Appeals, and Licensing conducts various onsite monitoring surveys to identify potential insufficiencies within assisted living programs. This session will outline the reasons why an onsite survey may be conducted, what information programs must provide to the monitors during a survey, and the expectations following an onsite visit.

## **Fair Housing and Legal Challenges (Alissa Smith & Becki Brommel, Dorsey & Whitney, LLP) 112 minutes**

Iowa assisted living programs must ensure that they are compliant with the fair housing laws at both a State and Federal level. Challenges are present even prior to a person applying to enter your program. This session outlines what the Federal and State laws entail and how assisted living programs can ensure compliance.

## **Life Safety Code in Assisted Living (Amy Fratzke, Department of Inspections, Appeals, and Licensing) 15 minutes**

This session will provide the assisted living manager with an overview of fire safety precautions and inspections. A discussion of the assisted living emergency plan will be held including recognition of hazards, fire drills, alarm systems, and evacuation plans, including those with special physical and mental disabilities.

## **Clinical Management and Aging Processes (Holly Lear, Meth-Wick Community) 56 minutes**

Complex medical diseases impact the daily lives of older adults. Learning to identify possible signs and managing these diseases to improve the quality of life of those you serve is critical to reducing tenant turnover. This session describes key clinical processes including infection control practices and medical diseases to provide an overview for program managers.

## **Use of Outside Resources (Cari Conrad, Friendship Haven) 59 minutes**

Assisted living tenants have many options on who can assist with the tenants care such as hospice, palliative care, therapy, pharmacy, and medical providers. Incorporating the outside services into the service plan is crucial to maintain compliance and ensure that staff are aware of who is providing the service to the tenant. This session reviews different options for outside services in assisted living programs and best practices on incorporating in the service plans.

## **Financial Management & Funding Sources (Kathy French, Ryun, Givens & Company, P.C.) 45 minutes**

Financial well-being of health care organizations is critical to the long-term success of the business. At times the overall financial success of the organization can be linked to the mission, vision and culture of the assisted living. This session will provide attendees with basic instruction on managing program revenue and expenses to aid in the long-term success of the program manager and the program..

## **Census Development (Stacy Hejda, Healthcare of Iowa) 52 minutes**

Maintaining adequate occupancy levels is critical to the success of any assisted living program. This session explores strategies to improve occupancy levels in your program including customer service, presentation, and lead follow up.

## **Menu Planning (Julie Halfpop, Martin Bros, Distributing) 63 minutes**

Menus and food service can be an attracting element for marketing senior living communities. Well balanced and healthy meals also offer numerous benefits such as maintaining skin integrity and bone stability. This session provides key details on establishing a well-balanced menu that is attractive, marketable, and is nutritionally adequate.

### **Food Safety & Sanitation** (Julie Halfpop, Martin Bros, Distributing) 51 minutes

A key strategy to preventing foodborne illness is ensuring safe food preparation, handling, and serving. Additionally, sanitation in the food service area(s) are essential to maintaining a clean environment, equipment, and dishware. This session describes the correct food safety and sanitation strategies, commonly identified concerns, and a discussion on the inspection process for assisted living settings.

### **Leadership in Assisted Living Settings** (Amber Jedlicka, Oaknoll Retirement Residence) 46 minutes

Understanding the different leadership styles and what fits both the person and the team best is crucial to the leader's success. During this session you will learn the different leadership styles along with the positive and potentially negative impacts each leadership style may present. In addition, effective communication and pit-falls are discussed with best-practice strategies to ensure clear and concise communication between team members.

## **CONTINUING EDUCATION INFORMATION**

**Nursing Home Administrators** – This event is designed to provide 18.4 contact hours, aligning with the criteria set by the Iowa Board of Examiners for Nursing Home Administrators for participants who attend this event in its entirety. Please note that partial credit will not be granted; full attendance is required to receive contact hours or a certificate of attendance.

**Iowa Board of Nursing** – 18.4 contact hours is intended to meet the criteria established by the Iowa Board of Nursing for participants who attend this event in its entirety. Partial credit for this event will not be granted. To receive contact hours or a certificate of attendance, you must attend the entire event. Retain your certificate for four years.

**For other long-term support and service provider professional not listed above:** Most licensure boards, credentialing agencies and professional organizations have processes that allow individuals to earn a certain number of CEUs for non-preapproved programs and/or to accommodate self-submission for approval of continuing education hours after the event takes place with proper documentation from the program sponsors. It is up to the discretion of the licensee to choose relevant sessions and self-report. Generic certificates of attendance will be provided.

## **FACULTY**

**Becki Brommel** is a member of the health care litigation group of Dorsey & Whitney. She routinely assists long-term care facilities with survey and citation matters, involuntary discharges, collections and other litigation matters. In addition, Becki assists health care professionals with licensing board matters. She has been practicing law for more than 20 years.

**Catie Campbell** has worked with the Department of Inspections, Appeals, & Licensing as a program coordinator in the special services and adult services bureaus since 2009. Catie began her employment with the Department as a surveyor for the special services bureau and in 2014 moved into the program coordinator position for Intermediate Care Facilities for Individuals with Intellectual Disabilities (ICF/ID) and assumed the role of program coordinator for the adult services bureau in July 2016, as well. Catie completed her bachelor's degree from Coe College in Cedar Rapids, Iowa and prior to joining DIAL worked for an ICF/ID provider as a unit facilitator and qualified intellectual disabilities professional.

**Cari Conrad MHA, BSN, RN** is the director of independent and assisted living at Friendship Haven in Fort Dodge. She has been a registered nurse for 12 years earning Bachelor's Degrees in Biology and Nursing, and her Master's in Health Administration from Briar Cliff University. She has worked as an emergency department nurse, performance improvement and accreditation specialist, and Regional Director of Care Management within the hospital setting where she led teams planning for care coordination, discharge planning, and population health. She joined the Friendship Haven team as the Director of Assisted Living in 2021 and oversees the operations of the independent living and assisted living areas of the Friendship Haven campus, which includes the two licensed assisted living programs, one general licensure and the other for dementia and memory support.

**Amy Fratzke**, Management Analyst 3, Fire Safety Bureau, Department of Inspections, Appeals and Licensing. Amy transitioned to the Department of Inspections, Appeals, and Licensing conducting Life Safety Code surveys after serving 30 years with the Iowa Department of Public Safety. Amy has 24 years experience with the State Fire Marshal's Office as a Fire Prevention Inspector.

**Kathy French, CPA** is the owner of Ryun, Givens & Company, P.C. Kathy is a graduate of Grandview College and has been with the firm since 2001 with 5 years of experience with the Auditor of State prior to joining RCC. Her responsibilities include supervising and reviewing work product of the firm and providing technical assistance to long-term care providers. Her experience with the industry has provided her with history and expertise in audit, accounting and cost report preparation requirements. Kathy is a member of the Iowa Society of Certified Public Accountants and the American Institute of Certified Public Accountants.

**Julie Halfpop** is the director of nutrition services at Martin Bros. Distributing. She has devoted 35 years to inspiring dining strategies to maximize client satisfaction and wellness in senior living. She currently oversees 10 dietitians who work closely with senior living professionals in menu development, provision, and staff education.

**Stacy Hejda** is co-owner and consultant with Healthcare of Iowa, formerly Assisted Living Partners. She provides consulting services to assisted living facilities focusing on program development and regulatory compliance monitoring as well as elderly waiver and HUD rental assistance programs. Hejda has more than 20 years' experience working with assisted living programs in Iowa.

**Amber Jedlicka** is currently the director of health services for Oaknoll, in Iowa City, Iowa. Amber has 22 years of experience working as an upper level manager in top notch, full-service retirement communities in Iowa. Five of those years she served as the director of a dementia specific assisted living. Amber has conducted numerous training seminars over the years with a focus on her passion of employee growth and development, having fun in the workplace, customer service skills, communication skills, and working in a people-centered business model. Amber is a graduate of the University of Northern Iowa, with a Bachelor of Arts in family services and received her M.B.A in Business Administration, University of Dubuque, 2021. She is also a past-president of the Downtown Waterloo Rotary. In the fall of 2009, at the age of 30, Amber was recognized as one of the Cedar Valley's top twenty business professionals under the age of forty. Amber was also a member of the Waterloo Toastmasters where she earned recognition as a Competent Communicator (CC). She serves on the Board of Directors for LAI/LAIL and was selected by LeadingAge National to be a part of the 2024 Larry Minnex Leadership Academy in 2024.

**Holly Lear** is a PhD prepared nurse leader. She has worked at two top rated Skilled Nursing Facilities in Eastern Iowa. She currently leads the Woodlands as a Nursing Home Administrator at Meth-Wick Community. Previously, she worked as a Director of Nursing during the height of the Covid-19 pandemic. She has taught the last five years as a clinical nursing instructor at Kirkwood Community College.

**Amy Skelton** has 20 plus years of Nursing experience both in acute care and post-acute care settings. She served as Director of Nursing for 7 years at a CCRC and has extensive experience in regulatory compliance, process improvement, and implementation of EHR systems. Amy is currently a Nurse Consultant for HealthCARE of Iowa working with Long Term Care and Assisted Living facilities on regulatory compliance, education and staff development.

**Alissa Smith** is co-chair of Dorsey & Whitney's Health Care Transactions & Regulatory practice group. She routinely represents long-term care facilities and other health care providers in transactional and regulatory matters.

**Kellie Van Ree** is the Vice President of Clinical Services & Education Strategy for LeadingAge Iowa. She has more than 20 years' experience in the health care industry. In addition to a Registered Nurse license, Kellie also holds an active Nursing Home Administrator's license. Kellie has served in many capacities in the long-term care field including Director of Nursing, Corporate Consultant and most recently Administrator. Kellie has also served as a health facilities surveyor for a short time.

## MORE INFORMATION :

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