



2023 Spring Conference & Solutions Expo

May 3-4, 2023

The Meadows Conference Center • Altoona, IA



THE GREATER GOOD

Our world is complex, but our common goal is simple – we dedicate ourselves to creating positive change and improving the lives of older adults wherever they call home. As we focus on a wide and rapidly-evolving range of issues – it’s more important than ever to harness the combined power of our mission-driven LeadingAge Iowa professionals. That’s why aging services leaders from across our state will come together at the LeadingAge Iowa Spring Conference on May 3-4 at The Meadows Conference Center in Altoona. Across our education program, we’ll spend time talking about the critical issues and strategic priorities that matter to us most, and prominent experts will share their experience and vision that is certain to inspire us all. When you tour the Solutions Expo, you’ll discover life-changing products and services, and during social events, you’ll build connections and camaraderie. This year will ignite your passion and your purpose to advance your mission for those you serve. Together we are stronger for *the greater good*. Go to www.LeadingAgeIowa.org/2023SpringConference for more information and to register.

Continuing education credit is available for general sessions and breakout sessions. To review credit available, go to <https://www.leadingageiowa.org/SpringConfCEUInfo>.

REGISTER NOW

General Session on Wednesday, May 3 @ 9-10 a.m.

Your Year of Wonders: Growing for the Greater Good in 2023

This exciting, evidence-based message will show how change around us unleashes growth inside us— growth in our teams, growth in our business and growth in ourselves. Organizational psychologist and #1 best-selling author, Nick Tasler, has helped hundreds of thousands of leaders transform seasons of change into periods of unprecedented growth. He will explain the fascinating way our brains are wired to unleash creative superpowers in the face of disruption and uncertainty. The result is wondrous solutions in business, science, and life.

Nick's trademark blend of self-deprecating humor, empirical evidence, and engaging storytelling will inspire attendees to rewrite the stories of past struggles and achievements so they can reimagine future possibilities and creatively execute present strategies. Invigorated by a fresh outlook, connected by a shared language, and armed with practical tools, attendees will be ready to cut through the chaos with a laser-like focus on organizational objectives, team priorities, and personal growth opportunities.

- Inspire energy and excitement in their workplace by changing the way their teams think about change.
- Discover how to leverage the creative superpowers that their brains have unleashed.
- Learn to lead change courageously and confidently by speaking the language of the 2nd Instinct.
- Explore ways to live and lead with passion, compassion, and authenticity.

Nick Tasler, Keynote Speaker, Author, Organizational Psychologist

Nick Tasler is an internationally acclaimed thought leader, organizational psychologist and a #1 best-selling author of *The Impulse Factor* and *Domino: The Simplest Way to Inspire Change*. Nick has helped tens of thousands of leaders around the world transform seasons of change into periods of unprecedented growth at the world's most respected organizations ranging from FedEx, Microsoft, and JP Morgan Chase to Hershey's, The Wharton School, Yale University and more.

Nick is also a Leadership Columnist for the Harvard Business Review and his work has been featured by The New York Times, NPR, BBC, NBC, CBS and other leading media outlets all around the world.

Nomadic by nature, Nick and his wife and their four kids live in...lots of places. Sometimes Minnesota. Sometimes Florida. Currently, Puerto Rico.

Breakout Session 101 on Wednesday, May 3 @ 10:45-11:45 a.m.

A Post-Pandemic Vision for the Future of Senior Living & Care

The "new normal" for senior living and care reveals unprecedented skilled nursing pressures, workforce shortages, and insufficient reimbursements while exciting developments around telehealth and alternative care solutions emerge. While much has changed in our industry, a lot stays the same as the demographic silver wave inches closer. Providers seeking growth opportunities, partnerships, and technology adaption can thrive in the face of unrestrained private sector competition. As capital markets face ongoing turmoil, now is the best time to plan for the next generation.

- Define what the short and mid-term future looks like for the not-for-profit senior living and care sector.
- Review the threats and opportunities for not-for-profit senior living providers.
- Explain several key steps necessary to position your organization for proactive growth.

Matt Mulé, Senior Vice President, Ziegler, Chicago, IL

Matt Mulé is a senior vice president of Ziegler, an investment bank specialized in financing not-for-profit senior living organizations. Dedicated to the Midwest region, Matt has completed more than 100 financings for more than \$3.5 billion for not-for-profit senior living providers.

Breakout Session 102 on Wednesday, May 3 @ 10:45-11:45 a.m.

Maximizing Volunteer Programs

Volunteers can help not-for-profit aging services providers advance their mission and enhance the services they provide. Learn from your peers from across the state about strategies they have implemented to not only make their volunteer programs more effective but also enhance the services offered by the community. The program will address the legal requirements and recommendations for background checks, health screenings, policy and procedure training, and rules related to the use of staff to perform volunteer activities.

- Identify best practices for effective volunteer programs.
- Discuss strategies how volunteer engagement can advance mission and enhance services.
- Analyze the regulatory and legal requirements for volunteers to support compliance.

Eryn Cronbaugh, CTRS, Director of Wellness and Recreation, The Meth-Wick Community, Cedar Rapids

Eryn Cronbaugh, CTRS, is the Director of Wellness and Recreation at The Meth-Wick Community in Cedar Rapids. She oversees an amazing team who provides recreation programming in 6 dimensions of wellness for their campus. This includes supervising the volunteer program and various volunteer opportunities available on campus. Eryn's degree is in therapeutic recreation from The University of Iowa. She has been at Meth-Wick for 22 years. Eryn is a graduate of the LeadingAge Iowa Leadership Academy.

Adam Freed, Partner, Dorsey & Whitney, LLP, West Des Moines

Adam Freed represents a wide range of health care providers, including physicians, dentists, mental health professionals, hospitals, and nursing facilities, as well as trade associations that serve health care providers. For facilities undergoing changes of ownership, Adam advises clients on issues related to licensing, Medicare and Medicaid enrollment, and credentialing with Medicaid managed care organizations and commercial insurers. Adam strives to provide strategic advice in a clear and concise manner to help providers navigate the maze of complex federal and state regulations with which they must comply. Adam also advises clients regarding compliance with the State of Iowa's Certificate of Need (CON) program and has appeared before the State Health Facilities Council. He also advises covered entities and business associates regarding HIPAA compliance.

Millisa Tierney, RN, CEO, NewAldaya Lifescapes, Cedar Falls

Millisa Tierney currently serves as CEO of NewAldaya Lifescapes in Cedar Falls. She has 40 years of experience in health care and senior living. Tierney has been an active member of LeadingAge Iowa serving on committees and the board of directors. She has also served as the board chair for LeadingAge Iowa in the past.

Tracy Connolly, Director of Resident Services, Stonehill Communities, Dubuque

Tracy Connolly currently serves as director of resident services at Stonehill Communities in Dubuque and has 20 years of experience in senior living in the Dubuque area. She earned her BA from Loras College in Dubuque. Tracy is an active volunteer for the Dubuque Veterans Affairs Office and has served as a guardian for the Honor Flight of Dubuque and Tri-States.

Breakout Session 103 on Wednesday, May 3 @ 10:45-11:45 a.m.

Care Transitions Across the Care Continuum

Communication and processes during care transitions are foundational components in health care outcomes. Implementing communication practices and processes between providers and settings can be a challenge, but a challenge we can embrace in meeting patient needs and providing safe, high-quality and patient-centered care. Join us to discuss best practices that promote positive patient

outcomes. We will identify tools and resources for use in effective communication across the care continuum.

- Define ways to collaborate with each other/providers to enhance care coordination. Discover mitigation strategies to build communication across care services.
- Recognize opportunities to build communication using Leadership and Organizing in Action (LOA) framework.
- Identify and prevent unplanned transfers.

Chloe Hird, MS, Senior Quality Improvement Facilitator, Telligen, Des Moines

Chloe Hird is a Senior Quality Improvement Facilitator at Telligen. Chloe has worked in a variety of settings across the care continuum and has a passion for working to improve the healthcare of Medicare beneficiaries. Chloe supports nursing homes and community healthcare providers across Iowa, Illinois, Colorado, and Oklahoma by providing personalized quality improvement technical assistance, education, and resources.

Kate LaFollette, RN, CPHQ, Quality Improvement Manager, Telligen, Des Moines

Kate LaFollette, RN, CPHQ, is a Quality Improvement Manager at Telligen. Kate has worked as a nurse for over 30 years, in quality improvement for 15 years. She excels at coaching, teaching, presenting and supporting QI concepts, tools and methodology. Kate has a strong compassion for improving transitions in care to support positive outcomes that improve the lives of patients across the Telligen region.

Breakout Session 104 on Wednesday, May 3 @ 10:45-11:45 a.m.

OSHA

If the final rules are released prior to our conference, OSHA will provide up-to-date information about the new OSHA COVID-19 final rules. The session will also include content associated with aging services and trends related to OSHA violations, prevention strategies and requirements for the health care sector such as blood borne pathogen training.

- Review new COVID-19 final rules for OSHA.
- Discuss trends related to OSHA violations and review prevention strategies for successful OSHA surveys.
- Explore requirements related to blood borne pathogen training in the health care sector.

Christopher Downs, Safety Consultant, Iowa OSHA, Des Moines

Chris Downs has been a safety consultant with Iowa OSHA consultation and education since mid-2014. He is an OSHA authorized trainer for OSHA 10- and 30-hour classes for both general industry and construction. He travels the state of Iowa providing compliance assistance and education to employers in all industries so that they can take charge of eliminating workplace hazards to minimize risk to their employees. He is a 10-year Navy combat veteran with deployments around the world and five years of experience aboard nuclear submarines, where he fulfilled safety and health responsibilities. Continuous improvement of safety and health management systems was not only mandatory, but it was also necessary for the successful completion of missions and to ensure that everyone on the team returned home to their families.

Breakout Session 105 on Wednesday, May 3 @ 10:45-11:45 a.m.

The Looming Labor Crisis – A Tale of Two Perspectives

The senior care industry has a workforce retention problem. This much is clear and largely agreed upon by most operators, however, the underlying reasons have never been less clear. Throughout this

presentation, we'll examine the misconceptions we make as community leaders and identify where we "get it right" and "get it wrong" in order to attract and maintain top talent.

- Explore what motivates vs. demotivates caregivers in their employment decisions
- Discover how caregiver motivations align or differ with community leader's understanding of caregiver motivations.
- Review non-traditional benefits that are most important to retain front-line caregivers.

Bryant McCann, General Manager, KARE, Houston, TX

An innovator in the post-acute and senior living space, Bryant McCann is currently the general manager of KARE, which is the leading solution to solve the labor shortage in senior care. Bryant is also a proud father of 3 children, all under 6 years old and husband to his beautiful wife, Shannon. Prior to KARE, Bryant held several roles at NRC Health, supporting post-acute and acute operators delivering exceptional experiences to residents, patients, and family members. Bryant has been instrumental in M&A, identifying and understanding how tech solutions can enhance the experiences of residents, patients, family members and staff in the post-acute and acute industry. Spending more than 14 years within health care, Bryant is passionate about building relationships and being a disruptor in the post-acute and senior living industry.

Breakout Session 201 on Wednesday, May 3 @ 1:15-2:15 p.m.

Everything Is Changing – What About Your Board?

As aging services organizations have innovated offerings and operations over the last several years, governance models and boards that should lead, inform, and govern have remained largely unchanged. While stability is important, just "doing the same old thing" with governance models, approach, or even composition shortchanges many organizations from the speed and agility necessary to navigate in the future. As our industry adapts, so must our thinking around governance. This session will consider the future state of aging services and what our offerings are likely to look like in the future, where and how governance needs to evolve, how other organizations have innovated their approach to board engagement, what are the five questions you need to ask about your own board, and what you maybe need to do about it.

- Describe the future state of aging services and the characteristics of both low- and high-performing boards
- Summarize how other leading non-profit and aging services organizations have adapted and innovated their approach to governance
- Evaluate current board performance and identify potential strategies to improve or adapt

Andy Edeburn, Managing Partner, Elder Dynamics, Rockford, MN

Andy Edeburn is an accomplished health care advisor and thought leader with more than 20 years of health care consulting experience, specializing in acute, post-acute, and senior care services. Over the course of his career, he has advised nearly 220 organizations in 38 states across a diverse range of issues. Andy guides organizations through their strategic thinking and planning efforts, hospital/health system and community-based partnerships, care coordination and care management programs, community-based care models, new program and facility development/redevelopment efforts, and operational and performance improvement. Andy is a sought-after speaker, facilitator, and author on a range of topics including health care reform and value-based thinking, strategic planning, population health, and continuum integration and alignment. Prior to founding Elder Dynamics, Andy served as a principal in Premier's Strategy, Innovation and Population Health Advisory Practice and as a vice president with The Camden Group in Los Angeles and Health Dimensions Group in Minneapolis, MN.

Breakout Session 202 on Wednesday, May 3 @ 1:15-2:15 p.m.

Giant Strides: Keys to a Successful Capital Campaign

Are you considering a capital campaign, but don't know where to start? This session will provide an overview of capital campaigns, from a feasibility study to creative ways to thank donors and everything in between. EDEN+ Fundraising and On With Life will walk through the campaign process from start to finish and share practical lessons from the recently completed Giant Strides campaign.

- Explain the process and benefits of a feasibility study prior to a capital campaign, information gained during a study, and the benefits leading into a campaign.
- Describe the components that go into campaign planning and prepare an organization for a capital campaign.
- Describe how the capital campaign is executed and the elements of success as well as think creatively about donor and volunteer engagement and stewardship opportunities at their organization.

Tyler Timko, CFRE, Vice President, EDEN+ Fundraising, Des Moines

Tyler Timko currently serves as vice president of EDEN+ Fundraising, providing feasibility studies, campaign counsel, and other fundraising services to a variety of nonprofit organizations. Tyler has more than 10 years of experience in fundraising and recently served as the president of the Central Iowa Chapter of the Association of Fundraising Professionals. He completed his MBA at Indiana University in 2015 and was recently named to the 40 Under 40 Fundraisers by the Association of Healthcare Philanthropy.

Sara Wilson, Development Director, On With Life, Ankeny

Sara Wilson is the development director at On With Life and joined the team in 2016. In her role, Sara partners with individuals and businesses to support the organization's mission of joining hands, hearts and minds to help persons living with brain injury or other neurological conditions get on with life. Sara is a graduate of Drake University (BA) and Iowa State (MBA) and has previously worked for the ISU Alumni Association and United Way of Story County.

Breakout Session 203 on Wednesday, May 3 @ 1:15-2:15 p.m.

Antipsychotic Medications: Now You See Them, Now You Don't

Care facilities across the state have been working over the past several years to improve care for persons living with dementia. The Centers for Medicare and Medicaid Services (CMS) announced the urgency of inappropriate diagnosing leading to unnecessary antipsychotic medication use and poor care in the CMS QSO-23-05-NH memo. Now is the time to revitalize your antipsychotic medication management program. Join this session to understand how quality improvement efforts can help your process that leads to antipsychotic reduction.

- Recognize the goal of the National Partnership to Improve Dementia Care.
- Define the impact of inappropriate antipsychotic medication use. Identify tools and strategies to improve your antipsychotic medication reduction process.
- Revitalize your quality improvement program using evidenced based methodologies.

Gina Anderson, RN, BSN, Senior Quality Improvement Facilitator, Telligen, Des Moines

Gina Anderson RN, BSN is a Senior Quality Improvement Facilitator at Telligen. She has worked in and supported nursing homes in a variety of roles for over 25 years including an MDS coordinator, Director of Nursing, and nurse consultant. In her current role she supports nursing homes across the Telligen region with quality improvement enhanced assistance, education, and resources. Gina has a strong

compassion for building relationships with providers to improve the lives of residents living in healthcare facilities.

Breakout Session 204 on Wednesday, May 3 @ 1:15-2:15 p.m.

Suicide in LTC Settings: Prevalence, Risk Factors, & Intervention Strategies

The presenter will discuss the prevalence of suicide in older adults and residents in LTC settings. General issues that contribute to suicide in later life, such as risk factors, the most common methods utilized, and frequent common warning signs will be presented. This course will provide information on suicide screening, conducting risk assessments, interventional strategies, and guidance on documentation.

- List three ways the adult older population is at highest risk for suicide. Identify 6 risk factors for completed suicide in LTC.
- List the 5 Ds of late life suicide.
- Explain two differences between suicide and self-harm.

Dr. Brenda Sprinkle, PhD, Licensed Psychologist, Regional Director, Deer Oaks-The Behavioral Health Organization, San Antonio, TX

Brenda Sprinkle, PhD, is a Licensed Psychologist and the Regional Director for Deer Oaks-The Behavioral Health Organization. Dr. Sprinkle obtained her PhD from Texas A&M University in 1992. Since 2007, Dr. Sprinkle has provided psychotherapy services to clients in nursing home facilities in the Austin/Hill Country region. She also manages/supervises Deer Oaks' Psychologists, LPCs and Licensed Clinical Social Workers in the Hill Country, West Texas and El Paso regions. Dr. Sprinkle develops and presents CEUs and conference presentations for Deer Oaks and has extensive experience providing training for LTC staff.

Breakout Session 205 on Wednesday, May 3 @ 1:15-2:15 p.m.

Workforce Partnerships Panel

As providers navigate the rough waters of workforce solutions, partnerships are a valuable tool to recruit and retain qualified aging services staff. During this panel discussion, attendees will hear from 3 aging services providers that have successfully leveraged workforce partnerships to grow their staff and access potential employees. This session will highlight some of workforce partnerships available to providers and discuss tips and lessons learned to start and sustain your own program.

- Identify available workforce partnership opportunities.
- Discuss the experiences, lessons learned and successes of aging services providers utilizing workforce partnerships.
- Describe how and why workforce partnerships can provide access to qualified staff.

Dr. Kim Bergen-Jackson, PhD, RN-BC, LNHA, Administrator, Oaknoll Retirement Residence, Iowa City

Dr. Kim Bergen-Jackson has more than 35 years' experience in Gerontological Nursing and currently serves as Administrator at Oaknoll in Iowa City where she has been affiliated for more than 20 years. She is also an Adjunct Assistant Professor in the School of Social Work (Aging and Longevity Studies Program) and the College of Nursing at the University of Iowa. She is involved in various nursing research projects at the state and national level and has spoken extensively on multiple topics. Kim is a graduate of the LeadingAge Larry Minnix Leadership Academy and is a coach for the 2023 LeadingAge Iowa Leadership Academy.

Samantha Roth, CEO, Sunrise Retirement Community, Sioux City

Samantha Roth is the current CEO/Executive Director at Sunrise Retirement Community in Sioux City. Driven by a passion to ensure seniors are receiving the high-quality care they deserve, she works with her team to build a culture where people have fun and want to work; Sunrise is a 5-star facility for both quality and staffing. Sunrise leverages workforce partnerships to help reduce agency utilization in their community; their largest partnership is a successful CNA training program.

Nancy Van Wyk, Nurse Educator, Hearthstone - The Cottages, Pella

Nancy Van Wyk is a clinical educator at Hearthstone, a Ministry of Wesley Life. She is also a part of the Peers Workforce Committee, the organization that sets the standards and competencies for the patient care apprenticeship

Ann Ernsperger, People and Culture Director, Hearthstone - The Cottages, Pella

Ann Ernsperger has served as the Director of People and Culture at Hearthstone since 2019. She graduated from William Penn University in 2016 with a bachelor of science in human resources management and services.

Natasha Nikkel, Wellness Director, Hearthstone - The Cottages, Pella

Natasha Nikkel has served as Hearthstone's Wellness Director since 2011. She received her bachelor of science in health and exercise science from Central college in 2010. She went on to graduate with a master of business administration from the University

Breakout Session 301 on Wednesday, May 3 @ 2:30-3:30 p.m.

Best Practices Related to Medicaid Elderly Waiver

This session will provide an overview of requirements to successfully provide HCBS Medicaid Elderly Waiver services. Topics to be reviewed with include overview of required policies/procedures, staff training, service documentation, internal auditing processes, invoicing for services, and claim collection. Best practices to provide quality services and the highest reimbursement will be discussed.

- Review staff training and policy requirements of HCBS Elderly Waiver.
- Explain staff service documentation requirements to minimize revenue losses or recoupments.
- Develop strategies to effectively manage Medicaid Elderly Waiver.

Theresa Hogenson, ALM, Consultant, Healthcare of Iowa, Cedar Rapids

Theresa Hogenson is a consultant with Healthcare of Iowa, formerly known as Assisted Living Partners. Theresa has an extensive background working with assisted living programs in Iowa and provides regulatory compliance for DIA survey preparation as well as Medicaid Elderly Waiver.

Breakout Session 302 on Wednesday, May 3 @ 2:30-3:30 p.m.

Planning for Prosperity: A Primer on Planting the Seeds of Sustained Giving

Join us for an interactive session that will empower your organization to grow its foundation through planned giving. You will learn about the various types of planned gifts and their unique benefits for both donors and nonprofits. Walk through the process of effectively communicating with potential donors, creating a customized planned giving program, and implementing it successfully and immediately. This session is designed to provide you with hands-on training and practical tools to ensure the long-term financial stability of your organization, especially on a shoestring budget. This session will be most useful to organizations that have little to no experience with planned giving and planned giving marketing.

- Review different types of planned gifts and the benefits they offer both donors and nonprofits. Prioritize prospective planned giving donors based on demographic, psychographic, and behavioral characteristics.
- Create and implement a successful planned giving program for their organization. Utilize tools and resources necessary to take their planned giving program to the next level, ensuring long-term financial stability for their organization.
- Develop effective strategies for communicating with potential donors about planned gifts.

Cherian Koshy, CFRE & CAP, Founder, Nonprofit Operating System, Wauke

Cherian Koshy, CFRE & CAP, is the founder of the Nonprofit Operating System, a platform that democratizes access to artificial intelligence and machine learning, exclusively to charities and NGOs. He has spent 25 years as a frontline fundraiser raising more than \$100M personally and continues to consult with dozens of nonprofit organizations on fundraising and strategy helping to secure more than half a billion dollars in philanthropy. He regularly presents to audiences all over the world on fundraising and charity topics. He is the vice chair for professional development on the global board of the Association of Fundraising Professionals and the former chair of the Iowa Commission on Volunteer Service (Volunteer Iowa).

Breakout Session 303 on Wednesday, May 3 @ 2:30-3:30 p.m.

Opioid and Illegal Substances Panel

Many long-term care providers are experiencing an alarming number of patients with substance use disorders, including the use of illegal substances in long-term care settings. However, much of this has not been experienced in long-term care before. Join an Opioid and Illegal Substances Panel discussion for varying viewpoints on this emerging trend. This session will include experts in law enforcement, regulatory, legal, and resident advocacy to provide attendees with different viewpoints to consider when developing policy and practice in long-term care settings.

- Describe how illegal substance use in long-term care may be impacted by regulatory and legal aspects
- Identify best practices for illegal substance use in long-term care.
- Discuss what resident rights remain in place when illegal substances are involved.

Robert A. Rotter, Sheriff, Iowa County Sheriff's Office, Marengo

Rob Rotter attended the University of Northern Iowa and has been a law enforcement officer since 1990 with the Iowa County Sheriff's Office. Rob was elected Iowa County Sheriff in 2008.

Alissa Smith, JD, MHA, Partner, Dorsey & Whitney LLP, West Des Moines

Alissa Smith is a partner in Dorsey & Whitney LLP's health group. Smith represents health care organizations such as health systems, hospitals, pharmacies, long-term care providers, home health agencies, and medical practices, as well as nonprofit and municipal organizations. Smith's practice involves a wide range of corporate and regulatory matters facing health care providers, nonprofit organizations, and municipal entities. Her transactional practice includes contracts, leases, mergers, acquisitions, and joint ventures. Smith's regulatory practice includes the interpretation and application of state and federal fraud and abuse laws, Medicare and Medicaid rules, tax-exemption laws, HIPAA and privacy laws, EMTALA laws, licensing matters, employment laws, governmental audits, open records and open meetings matters, and corporate and health system governance issues including the revision and negotiation of medical staff bylaws. She also assists with hospital-provider relations such as co-management arrangements, peer review investigations, and medical staff fair hearings. Smith represents health care providers before the State Health Facilities Council in Certificate of Need hearings.

Katie Cownie, JD, Partner, Dorsey & Whitney LLP, West Des Moines

Catherine Cownie, partner with Dorsey & Whitney, assists hospitals, health systems, long term and continuing care providers, dental practices, home health agencies, mental health providers and health practitioners. These representations often involve coordination with state licensing boards, Centers for Medicare and Medicaid Services, and other governmental credentialing entities. Cownie has experience in representing clients before the Iowa State Health Department's Certificate of Need Council, as well as negotiating with the Iowa Boards of Medicine, Nursing and Dentistry. Additionally, her transactional practice spans contracting, joint ventures, mergers, and acquisitions.

Vicki Worth, RN, BSBA, LTC Bureau Chief, Iowa Department of Inspections & Appeals, Des Moines

Vicki Worth started her health care career as a dietary aide in high school in 1993. After high school, she went on to receive a Bachelor of Science degree in Business Administration with a major in Marketing. Worth worked in advertising for many years then returned to the long-term care health care industry where she worked as a CNA, LPN, RN, and DON. Worth gained extensive experience in both management and clinical positions for skilled, intermediate, and dementia specific care units. She joined the Department of Inspection & Appeals in 2014 as a long-term care Health Facilities Surveyor conducting recertification and complaint surveys throughout Iowa. Worth promoted within DIA to a LTC Bureau Chief position in August 2020. She oversees surveyors who conduct the survey activities in long-term care facilities as well as overseeing surveyor training.

Breakout Session 304 on Wednesday, May 3 @ 2:30-3:30 p.m.

Dream Big for Resident Wellness

During this session, we will provide the framework for how two retirement communities ventured on journeys for providing innovative programming to support wellbeing for those living with Parkinson's Disease. We seek to engage participants in brainstorming how such programming may benefit their communities, and how we can use these stories to advocate for those we serve. By sharing experiences and knowledge, we strive to empower others to Dream Big in their pursuit of advancing excellence within senior living.

- Describe our journey of incorporating Rock Steady Boxing (RSB) in our communities.
- Examine the impact of RSB in the lives of those we serve.
- Discuss and present specific tools for creating a fun, dynamic program.

Tori Johnson, Speech-Language Pathologist, Director of Campus Wellness and Therapy, Friendship Haven, Fort Dodge

Tori Johnson is the Director of Campus Wellness and Therapy at Friendship Haven in Fort Dodge. Professionally, she has been a speech-language pathologist for more than 12 years and has extensive experience working alongside individuals with Parkinson's Disease. Tori is a graduate of the LeadingAge Iowa Leadership Academy. She is in her second year of coaching for the LeadingAge Iowa Leadership Academy.

Jon Jordan, Director of Community Well-Being, Heritage House, A WesleyLife Community, Atlantic

Jon Jordan is the Wellness Director at Heritage House in Atlantic. He has been a fitness professional most of his adult life and has always enjoyed helping people reach their potential and achieve their goals. He's an avid cyclist and runner and has held the position of race director and founder of the Whaletown Triathlon in Anita for 25 years.

Breakout Session 305 on Wednesday, May 3 @ 2:30-3:30 p.m.

What Hourly Workers Want More than Money

Big companies are driving up wages, but there are other ways to compete for talent. Money gets workers in the door; it may not make them stay. There are 7 things people want more than money, and the most important is a great boss. If your employees are engaged by a leader they trust, it can take a pay raise of more than 20% to poach them (Gallup).

- Explore ideas for creating an environment where people want to work.
- Discuss how you can tap into employee wants to boost retention.
- List strategies you can launch to compete for talent.

Austin Durham, Major Market Sales Executive - Healthcare, Paycor, Greenville, WI

Austin Durham has more than 10 years of award winning success in sales, consulting and sales leadership roles of increasing responsibility. His specialties include: Business Development, Customer Needs Assessment, Field Sales Management, Marketing Strategy, Negotiations, New Market Development, Profit Growth, Sales Closing, Sales Training & Development, Solutions Selling, Trend Analysis, Sales Forecasting, Strategic Alliances, Staff & Location Management, ROI Analysis, Marketing Development & Research.

Breakout Session 401 on Wednesday, May 3 @ 3:45-4:45 p.m.

Operational Solutions to Ignite Strong Performance

The current climate for SNF and AL operators is now more challenging than ever. Financial metrics can be a great tool to understand how an organization is performing and competing in the market, but metrics don't "tell the whole story" or discuss how can they be put into action. In this session, we will bring fresh perspectives from both financial and operational disciplines to discuss practical approaches to responding to financial risk, market challenges, and operational hurdles.

- Describe the current and projected state of the industry.
- Explore key metrics and benchmarks to pinpoint strengths and growth opportunities within each organization.
- Connect financial measures to operational performance and outcomes.

Deb Emerson, CPA, RAC-CT, RAC-CTA, Principal, CliftonLarsonAllen, West Des Moines

Deb Emerson is a principal with the health care and life science group of CLA's specializing in reimbursement and consulting services for senior living facilities, home health and hospice organizations. She has more than 29 years of experience handling the distinctive issues facing health care and life science organizations in today's challenging environment.

Breakout Session 402 on Wednesday, May 3 @ 3:45-4:45 p.m.

Steady Streams for Stronger Nonprofits: A Monthly Giving Masterclass

Are you tired of struggling to find reliable sources of funding for your nonprofit? Monthly giving is a proven method to ensure steady and predictable income, but how do you make it happen? In this session, you will learn how to design and implement effective monthly giving campaigns, how to use email and social media to promote giving, and how to engage and retain monthly donors. You will leave with practical tips, tools, and strategies to increase your monthly giving and secure the future of your nonprofit. In this highly interactive session, you'll come away with ideas as well as an execution strategy for how to start getting monthly donors right away.

- Explain benefits and challenges of monthly giving and how to prioritize prospective monthly donors based on demographic, psychographic, and behavioral characteristics.
- Create compelling monthly giving campaigns.
- Review ways to engage and retain monthly donors and utilize email and social media to promote giving.

Cherian Koshy, CFRE & CAP, Founder, Nonprofit Operating System, Waukee

Cherian Koshy, CFRE & CAP, is the founder of the Nonprofit Operating System, a platform that democratizes access to artificial intelligence and machine learning, exclusively to charities and NGOs. He has spent 25 years as a frontline fundraiser raising more than \$100M personally and continues to consult with dozens of nonprofit organizations on fundraising and strategy helping to secure more than half a billion dollars in philanthropy. He regularly presents to audiences all over the world on fundraising and charity topics. He is the vice chair for professional development on the global board of the Association of Fundraising Professionals and the former chair of the Iowa Commission on Volunteer Service (Volunteer Iowa).

Breakout Session 403 on Wednesday, May 3 @ 3:45-4:45 p.m.

DIA Updates for Nursing Homes

Nursing home recertification surveys are increasing in frequency in efforts to resume CMS requirements. In addition, DIA is experiencing increase complaints and incidents that are being investigated, resulting in deficiencies. During this session, DIA will provide attendees with examples of the most common cited deficient practices and explain practices that led to non-compliance.

- Review common cited deficiencies in nursing homes.
- Describe practice failures that resulted in non-compliance.

Vicki Worth, RN, BSBA, LTC Bureau Chief, Iowa Department of Inspections & Appeals, Des Moines

Vicki Worth started her health care career as a dietary aide in high school in 1993. After high school, she went on to receive a Bachelor of Science degree in Business Administration with a major in Marketing. Worth worked in advertising for many years then returned to the long-term care health care industry where she worked as a CNA, LPN, RN, and DON. Worth gained extensive experience in both management and clinical positions for skilled, intermediate, and dementia specific care units. She joined the Department of Inspection & Appeals in 2014 as a long-term care Health Facilities Surveyor conducting recertification and complaint surveys throughout Iowa. Worth promoted within DIA to a LTC Bureau Chief position in August 2020. She oversees surveyors who conduct the survey activities in long-term care facilities as well as overseeing surveyor training.

Breakout Session 404 on Wednesday, May 3 @ 3:45-4:45 p.m.

Are You Ready for Baby Boomers? Develop a Holistic Fitness Program

From now until 2030, 10,000 baby boomers will hit retirement age each day. Baby boomers like options including an abundance of activities, events and opportunities. Are you ready for them? Holistic fitness programs are key to living a healthy life and will offer the variety that boomers are seeking. Holistic fitness programs empower participants to remain active regardless of age or ability and to live their best life. This session will contain an interactive component so that you can experience holistic fitness. Please come prepared to have some fun.

- Define holistic fitness.

- Recognize the importance of adding variety to fitness programming.
- Participate in holistic fitness.

Kristin VanDyke, CTRS, CPO, Fitness Supervisor, Meth-Wick Community, Cedar Rapids

Kristin VanDyke is a fitness supervisor at Meth-Wick Community. She has a BS in exercise science from St. Ambrose University and MA in therapeutic recreation with an entrepreneurship emphasis at the University of Iowa. Early in her career, she worked in community and clinical organizations as a recreation therapist and has spent the last 11 years developing the fitness program at Meth-Wick Community. This unique blend of education and experience has helped make Meth-Wick's fitness program fun, engaging, and accessible to all residents by focusing on holistic fitness. Her goal is to ensure residents across the continuum of care are living their best life as healthy as possible.

Breakout Session 405 on Wednesday, May 3 @ 3:45-4:45 p.m.

Embracing Diversity and Inclusion Strategies Panel

The aging services workforce and the people they serve are becoming more diverse. Research has shown that communities that embrace diversity in their workforce have more success recruiting and retaining qualified staff. Attendees will hear from a panel of LeadingAge Iowa members across the state on strategies they have implemented to make their communities more inclusive and the positive impact it has had on residents, staff, and the community as a whole.

- Discuss strategies for creating a more inclusive environment on campus and embracing diversity.
- Identify ways to engage leadership, staff, and residents in DEI education and activities.
- Describe the positive impact DEI has on staff and how to make it a priority.

Brian Phillips, Campus Administrator, Highland Ridge, Williamsburg

Brian Phillips serves as the campus administrator at Highland Ridge Senior Living in Williamsburg and has been in that role since 2013. Prior to that Brian has served in various roles including risk management, project management, telecommunications, workers compensation case management and safety. He began his career as a nurse in the emergency department and has also worked in emergency medical services and as a reserve police officer. Brian has degrees in criminal justice, nursing and health care administration.

Adam Braden, Executive Director, Bishop Drumm Retirement Center, Johnston

Adam Braden began his career as a Nursing Home Administrator in 2011 and has served as Executive Director/Administrator of Bishop Drumm Retirement Center since 2017. He received his bachelor of arts in gerontology healthcare administration and Spanish with a minor in business administration from the University of Northern Iowa in 2011.

Meghan Ross, MA, MT-BC, Music Therapist, Oaknoll Retirement Residence, Iowa City

Meghan Ross, MA, MT-BC, is a music therapist and internship supervisor at Oaknoll Retirement Residence in Iowa City. She serves her residents at all levels of care. She considers working with older adults her passion, but also has experience working in hospice care, children with autism and intellectual disabilities, pediatrics, NICU care, and behavioral health.

Josiah Miller-Dohrer, Director of Environmental Services, Oaknoll Retirement Residence, Iowa City

Josiah Miller-Dohrer has worked for Oaknoll for five years. He says he stays because of the culture and sense of community amongst the residents and staff. Oaknoll strives to continue to grow our diversity group and bring new ideas to Oaknoll and the surrounding community. Josiah is a graduate of the LeadingAge Iowa Leadership Academy.

General Session on Thursday, May 4 @ 8:45-10 a.m.

Pursuing Life with Purpose and Passion

Dr. Richard Deming is a mesmerizing storyteller. Through his experience as an oncologist and the founder of Above + Beyond Cancer, a nonprofit organization dedicated to elevating the lives of those touched by cancer, he will share incredible stories about cancer survivors and the challenges they faced confronting their cancer. He will share inspirational stories of survivors pursuing ambitious goals and summiting mountaintops around the world. These personal, life-transforming stories have inspired audiences large and small for years and will help attendees live their lives with passion, compassion and authenticity and reach above and beyond their normal limits to achieve extraordinary goals.

These stories will resonate not only with cancer survivors but also aging services providers who have been climbing their own mountains related to the pandemic and workforce challenges the past few years. Through this adversity, we have had to apply personal strengths, often illusive before our journey. We've also had to acquire an appreciation for the talents of others, those who are there for their support. Through this journey, we are forever changed. In straightforward terms: ***Adversity Leads to Personal Growth.***

Ultimately, the journey is less about the view from the summit and more about the self-discovery and wisdom gained along the way. When all is said and done, when the backpacks and hiking boots are put away, life begins again, with a dramatically altered perspective. Priorities are re-ordered. Life is a gift and not a single minute should be "un-lived." Join Dr. Deming to reignite your purpose and passion.

- Discover the courage and confidence that cancer survivors acquire during their cancer journey.
- Explore the philosophical transformation that can occur as a result of facing a cancer diagnosis.
- Experience the beauty, joy, difficulties, and life-transformation that can occur when individuals are willing to reach above and beyond their normal limits to achieve extraordinary goals.
- Study ways to live their lives with passion, compassion, and authenticity.

Richard L. Deming, MD, Medical Director, MercyOne Cancer Center and Founder, Above + Beyond Cancer, Des Moines

Richard L. Deming, MD, is Medical Director of MercyOne Cancer Center in Des Moines. He received a bachelor's degree from South Dakota State University and his medical degree from Creighton University. Dr. Deming is known in the community for the compassionate care he provides cancer patients and their families. He is involved in many national, state, and community organizations and is the recipient of numerous awards. He was awarded the Lane Adams Award by the American Cancer Society for excellence and compassion in patient care. He is the recipient of "the one hundred" Award by Massachusetts General Hospital for his work with cancer survivors. He was awarded the Iowa Cancer Champion Award for his tireless efforts in the field of advocacy. He received the Iowa Star Award from the Des Moines Register for making a measurable difference within the community and improving the quality of life for Iowans everywhere. He was awarded the St. George National Medal by the American Cancer Society for leadership in reducing the burden of cancer.

Dr. Deming is also the founder of Above + Beyond Cancer, a nonprofit organization dedicated to elevating the lives of those touched by cancer. Dr. Deming has led cancer survivors on medical missions and inspirational mind-body-spirit pilgrimages to Mount Everest, Mount Kilimanjaro, and Machu Picchu. He is inspired by the courage and compassion of his patients and their families. His greatest ambition is to encourage others to pursue lives of meaning, purpose, passion, and compassion.

Breakout Session 501 on Thursday, May 4 @ 10:15-11:15 a.m.

Legal Updates You Must Know: State and Federal Legal Updates for Senior Services Providers

Hear from health care attorneys who work in the long-term care industry on a daily basis about the most pressing and current legal issues facing senior services organizations. The presenters will address new or changed state and federal laws and enforcement, as well as recent legal issues facing the industry. The presenters will provide resources and tips for compliance.

- Describe recent updates to state and federal laws that impact long-term care providers.
- Explain recent state and federal enforcement actions that impact long-term care providers.
- Recognize key proactive steps that can be taken to ensure compliance with new laws.

Alissa Smith, JD, MHA, Partner, Dorsey & Whitney LLP, West Des Moines

Alissa Smith is a partner in Dorsey & Whitney LLP's health group. Smith represents health care organizations such as health systems, hospitals, pharmacies, long-term care providers, home health agencies, and medical practices, as well as nonprofit and municipal organizations. Smith's practice involves a wide range of corporate and regulatory matters facing health care providers, nonprofit organizations, and municipal entities. Her transactional practice includes contracts, leases, mergers, acquisitions, and joint ventures. Smith's regulatory practice includes the interpretation and application of state and federal fraud and abuse laws, Medicare and Medicaid rules, tax-exemption laws, HIPAA and privacy laws, EMTALA laws, licensing matters, employment laws, governmental audits, open records and open meetings matters, and corporate and health system governance issues including the revision and negotiation of medical staff bylaws. She also assists with hospital-provider relations such as co-management arrangements, peer review investigations, and medical staff fair hearings. Smith represents health care providers before the State Health Facilities Council in Certificate of Need hearings.

Katie Cownie, JD, Partner, Dorsey & Whitney LLP, West Des Moines

Catherine Cownie, partner with Dorsey & Whitney, assists hospitals, health systems, long term and continuing care providers, dental practices, home health agencies, mental health providers and health practitioners. These representations often involve coordination with state licensing boards, Centers for Medicare and Medicaid Services, and other governmental credentialing entities. Cownie has experience in representing clients before the Iowa State Health Department's Certificate of Need Council, as well as negotiating with the Iowa Boards of Medicine, Nursing and Dentistry. Additionally, her transactional practice spans contracting, joint ventures, mergers, and acquisitions.

Breakout Session 502 on Thursday, May 4 @ 10:15-11:15 a.m.

The "Cost" of 100% Occupancy: Teach Sales Directors to Think Like Operators to Grow NOI

In this session, we flip the conversation from asking operators to think like salespeople to asking sales directors to think like operators. Sales directors' responsibility is move-ins and growing occupancy. Sales directors are typically directed to focus on activity (what is done) and conversion metrics. Most conversations revolve around hot leads and who can deposit and move in now. Recognition happens for a large high volume of move-ins, occupancy gain, and the ultimate pinnacle of 100% occupancy. While this is all good, we may be missing the mark in key areas of revenue gain. During this session, we will look at three areas of sales that have a great impact on operations and Net Operating Income (NOI); key areas that sales directors may not consider in their journey to 100% occupancy. We will discuss the

impact of shifting the focus from month-end occupancy goals, to growing average daily census, knowing the cost of concessions; how to craft and document sales concessions to limit risk and recover revenue quickly, and best practices in Customer Relationship Management (CRM) documentation for working with paid referral sources and review our investment in lead generation.

- Identify how sales directors can make decisions that have a positive impact on NOI.
- Explain how knowing the contract can help increase revenue.
- Gain insight into the true costs of concessions, rate reductions, and relying on paid referral sources.

Julie Podewitz, CEO & Founder, Grow Your Occupancy, Brentwood, TN

Julie is a senior living sales expert with many years of experience and a proven track record. Senior living sales is her passion. Julie has spent time on both the provider and consultant side, always with a focus on sales and marketing. She has presented at multiple national and state industry conferences, most recently for CALA (south) November 2021 and SMASH October 2021. She has participated in many expert panels via webinar during COVID; her next participation is with the Senior Housing News Sales Summit (Virtual) in January 2022. Julie began her career as a community sales director and quickly filled census-challenged buildings. Her experience as a sales trainer, coach and strategist has given her the insights she needs to successfully consult with hundreds of communities across 46 states. Prior to founding Grow Your Occupancy, she spent eight years in the VP of Sales, CMO, and CSO roles on the provider side, most recently with Vitality Living. During her career, her track record of increased sales and occupancy has resulted in more than \$70 million in increased revenue. All along, she kept her foot on the ground, never losing the “here and now” experience of the customer – the prospects, families, community, executive management, and ownership entities – she serves. She and her team have walked the walk, have grown with the business, know what works, what to do, and how to do it. Many in the industry consider her the “go to” resource for senior living sales; heck, she wrote the book! By starting her business, Julie expands her passion for sales, teaching, and seeing others succeed and grow their occupancy.

Breakout Session 503 on Thursday, May 4 @ 10:15-11:15 a.m.

Strategies to Reduce Adverse Dementia Sequela without Pharmaceuticals: For the Greater Good

With the understanding that every person is an individual with a life story and residual memory and skills, we can predict and prevent outbursts and difficulties to create an environment where the care is person-centered and able to function at their highest level while enjoying their life. Knowing the characteristics common to individuals with dementia, along with their personal history, will allow an anticipation of needs. This translates to success with safety, incontinence and fall prevention, improvement of skin integrity, and participation in self-care, and activity and leisure time that stimulates and engages. Strategies will be meaningful; family and staff interactions will bring joy both to the person with dementia as well as those participating in their care. The approach discussed will take into consideration that the person continues to be an individual who has a life that matters by utilizing strategies that allow for success, dignity, and joy thus reducing depression, learned helplessness and unwanted behaviors.

- Describe needs anticipated at various stages and types of dementia.
- Examine ways to contribute to care that is person-centered, meaningful, and functional.
- Discuss examples of communication, environmental changes and equipment modification, and activities that reduce depression, learned helplessness, outbursts, or unwanted behaviors

Kari K. Brizendine, PT, CWS, CDP, CADDCT, CMDCP, Education Specialist, Select Rehabilitation, Glenview, IL

Kari Brizendine, a physical therapist, is a graduate from Virginia Commonwealth University/Medical College of Virginia. An Education Specialist for Select Rehab, one of our nation's largest long-term care rehab providers, Kari has spent more than 39 years working with the geriatric population in a multitude of clinical settings where she has been responsible for patient care, clinical programming, education, and staff development. Her most recent interest has been working with Artificial Intelligence as it relates to fall prevention and reduction. She is a Certified Wound Specialist through the American Board of Wound Management, a Certified Dementia Practitioner and Trainer through the National Council of Certified Dementia Practitioners, a Certified Montessori Dementia Care Professional and she is LSVT Big Certified. Her predominant interest has been in serving those with dementia, their caregivers, health care providers and families, with the message that each person with dementia continues to have a life that matters, and that quality is possible if we all join that person using his or her personal interests, residual skills and memories in what she calls "My Way". She is the co-author of *My Past is Now My Future: A Practical Guide to Dementia Possible Care* and author of *Though You Do Not Know My Name I Know You Love Me Just the Same*.

Breakout Session 504 on Thursday, May 4 @ 10:15-11:15 a.m.

Fire Marshal Update for LTC & AL

Life safety code inspections impact provider's CMS Five-Star Rating Health Inspection Score, therefore it is critical for providers to maintain compliance with life safety code regulations. This session will provide the common deficient practices in long-term care services including nursing homes and assisted living buildings including the requirements to maintain compliance.

- Identify common deficient practices in long-term care services.
- Describe methods providers can take to maintain compliance.

Jacob Allspach, Special Agent in Charge, State Fire Marshal Division, Des Moines

In June of 2008, Jake Allspach was hired with the Iowa Department of Public Safety assigned to the Iowa State Patrol- District 16 Capital Complex and attended the Iowa Department of Public Safety's 35th Basic Academy. Upon graduating the academy, Jake served as a State Trooper in District 8- Mason City and District 4- Denison. In 2014, Jake transferred to District 8- Mason City and served there until transferring to District 4- Denison. While serving with the Iowa State Patrol, Jake held duties as a Technical Collision Investigator, and was a member of the Iowa State Patrol Honor Guard. In January of 2019, Jake was selected and transferred to the Iowa State Fire Marshal Division as a Fire Inspector assigned to West Central Iowa. Throughout his time with the State Fire Marshal Division, Jake has had the pleasure to serve and be involved in several other assignments within the division and department to include serving as an Field Training Officer to new Fire Inspector's, assisting with DPS academy physical fitness testing and oral board interviews, serving as a DPS Recruit Mentor, serving as the SPOC President to the Iowa State Fire Marshal's Association along with being a member on the DPS Health & Safety Board. In April of 2022, Jake was promoted to Special Agent in Charge within the Iowa State Fire Marshal Division- Fire Prevention Bureau where he supervises state fire inspectors and oversees the CMS Program (Healthcare).

Breakout Session 505 on Thursday, May 4 @ 10:15-11:15 a.m.

This Before Anything Else

During this session we will discuss four basic needs everyone has. We will focus in on one of those needs. Trust is foundational when building a healthy culture of any organization. We will discuss what that means and where there are opportunities every day. Trust not only helps organizations build a healthy culture, it also impacts efficiency and productivity. Stop wasting time on toxicity and understand why time building trust is crucial.

- Describe followers four basic needs
- Identify why trust is crucial in building a healthy organization.
- Describe what it means to trust in individual relationships and in teams.

Julie Thorson, LNHA, Head Coach, Friendship Haven, Fort Dodge

Julie Thorson was the 2018 recipient of the LeadingAge Dr. Herbert Shore Outstanding Mentor of the Year award. She currently co-facilitates LeadingAge Iowa's Leadership Academy. She is a graduate and former coach of the LeadingAge Larry Minnix Leadership Academy. The Head Coach (president and CEO) of Friendship Haven, a life plan community in Fort Dodge, Thorson is a coach's daughter at heart. A former part-time nursing home social worker, she is a licensed nursing home administrator and completed LeadingAge's Leadership Educator Program in 2019.

Breakout Session 601 on Thursday, May 4 @ 12:30-1:30 p.m.

If You're Not at the Table, You're Probably on the Menu

Many non-profit organizations are not positioned to react when mergers and acquisitions and affiliation opportunities arise. This session explores steps management can take to be in a position of strength when considering future acquisitions or a sponsorship transition of your own ministry. We will look at steps providers are taking with their Board to be proactive to be at the table when mission-advancing opportunities are included on the menu. Attendees will take away tools that their Board can adopt to ensure alignment and board buy-in when evaluating opportunities.

- Describe the importance of keeping your board up to date with the type and velocity of affiliations and sponsorship transitions happening in the senior living industry
- Explain how other non-profits and for-profits are successfully positioning themselves to grow (and/or divest) via mergers and acquisitions
- Explore how to use the take-away tool and how it can be customized for your community. A sample will be discussed and the tool will be available for providers to 'take-home' after the session

Lynn M. Daly, Executive Vice President, HJ Sims, Oak Park, IL

Lynn Daly joined Sims in April 2020, opening the Chicago office. She has more than 30 years experience financing non-profit organizations. Prior to joining HJ Sims in 2020, Lynn spent six years at BB&T Capital Markets, leaving as the acting head of the Senior Living Team. Prior to BB&T, Lynn spent eight years at Ziegler and 17 years at various banks in their non-profit teams, including opening and managing the Chicago Office/Midwest Region of Allied Irish Bank. Throughout her career, Lynn has been involved in financing over 250 not-for-profit senior living, health care, educational and religious sponsors focused in MI, OH, IL, WI, MN, and IN and the broader Midwest region. She currently serves on the Board of Trustees of a Catholic sponsored ministry in Michigan.

Breakout Session 602 on Thursday, May 4 @ 12:30-1:30 p.m.

Building a Stronger Sales Pipeline: The Impact of Outreach

In senior living, sales leads that come from professional referral sources and from word-of-mouth are 7 times more likely to convert to move-ins than leads from paid aggregators, yet our industry continues to rely on this costly option. In this session, we will look at strategies and action steps that will help you successfully move away from relying on paid lead sources. We'll also help you create a plan for developing your own network of referral sources to strengthen your sales pipeline.

- Review the impact areas of outreach.
- Develop action steps needed to conduct successful professional outreach.
- Explore writing strategic plan and takeaways of continuing to create their own outreach strategy/marketing plan.

Julie Podewitz, CEO & Founder, Grow Your Occupancy, Brentwood, TN

Julie is a senior living sales expert with many years of experience and a proven track record. Senior living sales is her passion. Julie has spent time on both the provider and consultant side, always with a focus on sales and marketing. She has presented at multiple national and state industry conferences, most recently for CALA (south) November 2021 and SMASH October 2021. She has participated in many expert panels via webinar during COVID; her next participation is with the Senior Housing News Sales Summit (Virtual) in January 2022. Julie began her career as a community sales director and quickly filled census-challenged buildings. Her experience as a sales trainer, coach and strategist has given her the insights she needs to successfully consult with hundreds of communities across 46 states. Prior to founding Grow Your Occupancy, she spent eight years in the VP of Sales, CMO, and CSO roles on the provider side, most recently with Vitality Living. During her career, her track record of increased sales and occupancy has resulted in more than \$70 million in increased revenue. All along, she kept her foot on the ground, never losing the “here and now” experience of the customer – the prospects, families, community, executive management, and ownership entities – she serves. She and her team have walked the walk, have grown with the business, know what works, what to do, and how to do it. Many in the industry consider her the “go to” resource for senior living sales; heck, she wrote the book! By starting her business, Julie expands her passion for sales, teaching, and seeing others succeed and grow their occupancy.

Breakout Session 603 on Thursday, May 4 @ 12:30-1:30 p.m.

Completing Thorough Investigations to Reduce Litigation and Maintain Compliance

Rules and regulations in nursing homes and assisted living require that long-term care providers have a thorough process for completing investigations for incidents in their organization. Thorough investigations will provide DIA with information necessary to determine if an on-site investigation is warranted. Completing thorough investigations may not only provide necessary information to the organization to make decisions on future practices but may reduce the time surveyors spend in the building during an on-site investigation and reduce potential litigation from the incident. This session will provide organizations with best practices for completing a thorough investigation including conducting interviews with witnesses and other staff, record reviews, identifying privileged documentation, and collecting evidence.

- Identify common litigation and risks in long-term care.

- Describe what documents are privileged and other protections for long-term care documentation. Describe strategies for reviewing resident/tenant records to ensure accurate and complete documentation is present regarding an incident.
- Determine necessary interviews that should be completed during an investigation

Rebecca A. Brommel, Partner/Attorney, Dorsey & Whitney LLP, Des Moines

Becki Brommel is an attorney at Dorsey & Whitney LLP practicing in the area of litigation and administrative law with an emphasis in health law. She assists numerous long-term care clients and other health care providers with citations and other administrative proceedings, professional licensing, and litigation matters.

Breakout Session 604 on Thursday, May 4 @ 12:30-1:30 p.m.

Interactive Technology for Residents with Dementia

With a growing aging population, it is critical that we utilize innovative technology to help provide better care. This presentation will display new technologies that address various unmet needs in the older adults with dementia.

- Identify the current issues and unmet needs in technology for people with dementia.
- Explore the various new technologies available to advance their ability to provide care.
- Describe how person-centered design can create better products for people with dementia.

Marie-Anne Bazerghi, Chief Growth and Innovation Officer, Euforia, Montreal, Quebec

Marie-Anne Bazerghi is a business executive at Euforia, a company dedicated to improving the quality of life of people living with dementia. She understands the multiple challenges communities are facing; from changing demographics to staffing shortages, and strives to bring to North America technological solutions that can enable care teams to provide high-quality, person-centered care. In her role, she researches the world for the latest solutions, products, technologies or services designed specifically for older adults with dementia.

Breakout Session 605 on Thursday, May 4 @ 12:30-1:30 p.m.

Start Building Trust Today

During this session we will dive into hands-on tools and tips to get started or restart your efforts for creating, building and sustaining trust in your organization. We will review and explain individual work, relationship building, and team building tools. You will leave this session with practical, achievable ideas to get started. If you are already working on building trust, this session will offer more or tips and tools to add to your toolbox.

- Identify tools for building trust daily.
- Explain ways to create trust within teams.
- Examine the relationship between building trust and healthy effective organizations.

Julie Thorson, LNHA, Head Coach, Friendship Haven, Fort Dodge

Julie Thorson was the 2018 recipient of the LeadingAge Dr. Herbert Shore Outstanding Mentor of the Year award. She currently co-facilitates LeadingAge Iowa's Leadership Academy. She is a graduate and former coach of the LeadingAge Larry Minnix Leadership Academy. The Head Coach (president and CEO) of Friendship Haven, a life plan community in Fort Dodge, Thorson is a coach's daughter at heart. A former part-time nursing home social worker, she is a licensed nursing home administrator and completed LeadingAge's Leadership Educator Program in 2019.

Breakout Session 701 on Thursday, May 4 @ 1:45-2:45 p.m.

How to Incorporate Middle Market Products on your Campus

This session will highlight the strategic significance of extending housing to the middle market. Understand the increasing pressure on senior living providers to meet the demands of the emerging middle market. Learn what baby boomers and their families are really looking for when it comes to middle market housing and services. Additionally, we will review current design strategies including common space considerations, accommodation styles to reduce construction costs and maximize efficiencies.

- Explain the demand and reasons behind the demand for moderate priced housing
- Identify key success factors for development, including location considerations, campus integration, and service offerings.
- Consider design, construction and financing strategies for these and other capital projects.

Lynn Daly, Executive Vice President, HJ Sims, Oak Park, IL

Lynn Daly joined Sims in April 2020, opening the Chicago office. She has more than 30 years experience financing non-profit organizations. Prior to joining HJ Sims in 2020, Lynn spent six years at BB&T Capital Markets, leaving as the acting head of the Senior Living Team. Prior to BB&T, Lynn spent eight years at Ziegler and 17 years at various banks in their non-profit teams, including opening and managing the Chicago Office/Midwest Region of Allied Irish Bank. Throughout her career, Lynn has been involved in financing over 250 not-for-profit senior living, health care, educational and religious sponsors focused in MI, OH, IL, WI, MN, and IN and the broader Midwest region. She currently serves on the Board of Trustees of a Catholic sponsored ministry in Michigan.

Breakout Session 702 on Thursday, May 4 @ 1:45-2:45 p.m.

Prepare for the 2023 Medicaid LTC Changes

LTC providers will experience several key changes related to Medicaid payments and rates in 2023. This session will review the changes for the Quality Assurance Assessment Fee which will be retroactively effective to April 1, 2023, as well as the related rebasing and case mix index adjustments effective July 1, 2023. Attendees will also receive guidance on how to evaluate the impact on their community and potential strategies for positioning their organization for success.

- Review the upcoming LTC Medicaid payment changes taking effect during the 2nd and 3rd quarters of 2023.
- Evaluate the impact on the organization and strategies on how to best position their organization.
- Identify topics to consider when planning for the future.

Alexandrea Keller, CPA, Manager, Williams & Company CPA's, Onawa

Alexandrea (Alex) Keller is a manager at Williams & Company focusing her time in the Iowa long-term care industry. Passionate about serving not-for-profit and for-profit clientele, her goal is to help clients with more than compliance needs. As champion of the data analytics service line, she utilizes advanced tools to provide comparisons and industry averages to aid in decision making. Other services that Alex has expertise with include feasibility studies for construction and financing, Medicaid and Medicare cost reporting, private rate analysis, tax planning and preparation, along with auditing, compilation, and review services. Over the past several years, Alex has worked diligently to follow COVID-19 relief funding packages that have been signed into law and provide clients with clear information to help them understand what is relevant and available to them.

Breakout Session 703 on Thursday, May 4 @ 1:45-2:45 p.m.

Lessons Learned from Onsite ICAR Assessments

The Healthcare Associated Infections (HAI) team with Iowa Health and Human Services have completed several onsite Infection Control Assessment and Response (ICAR) assessments providing long-term care providers ideas and suggestions to enhance their infection control practices. During this session, the HAI team will identify common concerns identified in long-term care with the ICAR process and provide strategies to enhance infection prevention and control practices to providers to reduce healthcare associated infections.

- Describe common concerns identified during onsite ICAR assessments.
- Identify practices that can reduce infection transmission in health care settings.

Tyra Goss, BSN, RN, Healthcare Associated Infections Nurse Clinician, Iowa Department of Health and Human Services, Des Moines

Tyra Goss is a Healthcare Associated Infections Nurse Clinician with the Iowa Department of Health and Human Services. She has more than 20 years of direct patient care experience before transitioning to infection prevention in the acute care setting in 2015. She has been with Iowa HHS for five years working with infection preventionists in health care settings across Iowa.

Breakout Session 704 on Thursday, May 4 @ 1:45-2:45 p.m.

DIA Updates for Assisted Living Providers

Many providers are awaiting assisted living recertification monitoring visits from DIA as the pandemic winds down. This session will provide assisted living organizations with updates on current trends in insufficiencies including a Q&A to aid providers in maintaining compliance.

- Identify current insufficiency trends.
- Describe methods to maintain compliance to commonly cited insufficiencies.

Catie Campbell, Bureau Chief, Adult and Special Services Bureau, Iowa Department of Inspections & Appeals, Des Moines

Catie Campbell has been with the Department of Inspections and Appeals in the special services and adult services bureaus since 2009. Campbell began her employment with the Department as a surveyor for the Special Services Bureau. In 2014 she moved to the program coordinator position for Intermediate Care Facilities for Individuals with Intellectual Disabilities (ICF/ID) and assumed the role of program coordinator for Adult Services Bureau in July 2016, as well. Campbell has a bachelor's degree from Coe College in Cedar Rapids. Prior to joining DIA, she worked for an ICF/ID in the Cedar Rapids area as a unit facilitator and qualified intellectual disabilities professional.

Breakout Session 705 on Thursday, May 4 @ 1:45-2:45 p.m.

Fight the Frazzle: Practical Ways to Manage Stress

Burnout. Fatigue. Exhaustion. We have been past the breaking point for years and something must give. Unfortunately, we can't make our stress, or our team's stress, magically disappear. What we can do is incorporate small, easy tools to help alleviate anxiety, pressure, and negativity in our lives. Return to your team with new ways you can help them approach stress and care for themselves so they can continue to care for others.

- Utilize an easy exercise to help calm down during times of anxiety.

- Implement an exercise to help them understand what they can and can't control in life.
- Tackle tough conversations or tasks using an easy to use worksheet,

Erika Danielle Kramer, LNHA, Director of Iowa Sales and Educational Development, Trio Pharmacy Services, Dike

Erika Kramer graduated from the University of Northern Iowa with a BA in business management. She started as an intern for Martin Brothers in 2005 and worked in the medical supplies department in May of 2006 and became the marketing and education director in June of 2009, focusing on nursing education events and webinars as well as tools for the nursing side in long-term care. In April 2014, Erika became the Healthcare Market Developer for Missouri, focusing on the nutritional services in Senior Living Communities. In 2016, she pursued her administrators license at Des Moines Area Community College and passed her national administrator boards in March of 2017. Erika is currently the Iowa Director of Sales and Educational Development for United Scripts.

SCHEDULE OF EVENTS

Please Note: The sessions highlighted for each professional area are recommendations only and do not indicate that CEUs for the session have been applied for or have been awarded by the various licensure boards and professional organizations. Information on CEU approval status will be listed on the LAI website as soon as they are confirmed.

Organizational Leaders	Nursing/Clinical	CFO/Finance	Marketing/Philanthropy	HR/Compliance	Wellness/Activities	Environmental Services	Board Members/Trustees	HCBS	Independent Living	Assisted Living	Nursing Home
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Wednesday, May 3 • 9 – 10 a.m. | General Session

Your Year of Wonders: Growing for the Greater Good in 2023

Nick Tasler, Keynote Speaker, Author, Organizational Psychologist

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Wednesday, May 3 • 10 – 10:45 a.m. | Solutions Expo & Break

Wednesday, May 3 • 10:45 – 11:45 a.m. | Breakout Sessions

101: A Post-Pandemic Vision for the Future of Senior Living & Care

Matt Mulé, Ziegler

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102: Maximizing Volunteer Programs

Eryn Cronbaugh, The Meth-Wick Community; Adam Freed, Dorsey & Whitney, LLP; Millisa Tierney, NewAldaya Lifescapes & Tracy Connolly, Stonehill Communities

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103: Care Transitions Across the Care Continuum

Chloe Hird & Kate LaFollette, Telligen

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104: OSHA

Christopher Downs, Iowa OSHA

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105: The Looming Labor Crisis - A Tale of Two Perspectives

Bryant McCann, KARE

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Wednesday, May 3 • 11:45 – 1:15 p.m. | Solutions Expo & Lunch (lunch included)

Sponsored by: Right Dose Pharmacy

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Organizational Leaders	Nursing/Clinical	CFO/Finance	Marketing/Philanthropy	HR/Compliance	Wellness/Activities	Environmental Services	Board Members/Trustees	HCBS	Independent Living	Assisted Living	Nursing Home
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Wednesday, May 3 • 1:15 – 2:15 p.m. | Breakout Sessions

201: Everything is Changing - What About Your Board?

Andy Edeburn, Elder Dynamics

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202: Giant Strides: Keys to a Successful Capital Campaign

Tyler Timko, EDEN+ Fundraising & Sara Wilson, On With Life

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203: Antipsychotic Medications: Now You See Them, Now You Don't

Gina Anderson, Telligen

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204: Suicide in LTC Settings: Prevalence, Risk Factors, & Intervention Strategies

Dr. Brenda Sprinkle, Deer Oaks-The Behavioral Health Organization

✓	✓				✓			✓	✓		✓
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205: Workforce Partnerships Panel

Dr. Kim Bergen-Jackson, Oaknoll Retirement Residence; Samantha Roth, Sunrise Retirement Community; Nancy Van Wyk, Ann Ernsperger & Natasha Nikkel, Hearthstone-The Cottages

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Wednesday, May 3 • 2:30 – 3:30 p.m. | Breakout Sessions

301: Best Practices Related to Medicaid Elderly Waiver

Theresa Hogenson, Healthcare of Iowa

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302: Planning for Prosperity: A Primer on Planting the Seeds of Sustained Giving

Cherian Koshy, Nonprofit Operating System

✓		✓	✓		✓		✓	✓	✓	✓	✓
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303: Opioid and Illegal Substances Panel

Robert Rotter, Iowa County Sheriff's Office; Alissa Smith & Katie Cownie, Dorsey & Whitney LLP; Vicki Worth, Iowa Department of Inspections & Appeals

✓	✓			✓						✓	✓
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304: Dream Big for Resident Wellness

Tori Johnson, Friendship Haven & Jon Jordan, Heritage House

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Wednesday, May 3 • 2:30 – 3:30 p.m. | Breakout Sessions Continued

305: What Hourly Workers Want More than Money
Austin Durham, Paycor

✓	✓	✓		✓	✓	✓	✓	✓	✓	✓	✓
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Wednesday, May 3 • 3:45 – 4:45 p.m. | Breakout Sessions

401: Operational Solutions to Ignite Strong Performance
Deb Emerson, CliftonLarsonAllen

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402: Steady Streams for Stronger Nonprofits: A Monthly Giving Masterclass
Cherian Koshy, Nonprofit Operating System

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403: DIA Updates for Nursing Homes
Vicki Worth, Iowa Department of Inspections & Appeals

✓	✓			✓	✓	✓					✓
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404: Are You Ready for Baby Boomers? Develop a Holistic Fitness Program
Kristin VanDyke, Meth-Wick Community

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405: Embracing Diversity and Inclusion Strategies Panel
Brian Phillips, Highland Ridge; Adam Braden, Bishop Drumm Retirement Center; Meghan Ross & Josiah Miller-Dohrer, Oaknoll Retirement Residence

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Wednesday, May 3 • 5 – 6:30 p.m. | Social Reception

Join us for the LAI social reception for some fellowship with your colleagues across the state, a chance to relax and unwind after a full day of learning, as well as enjoy some fun interactive games. What a better way to liven up the evening and relax than by joining in on some friendly competition? It will undoubtedly be full of laughs and fun!

So be sure to come and join us to grab a drink, enjoy some good food, and get your game on with us. It will fun evening you won't want to miss!

Sponsored by: **KARE**

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Organizational Leaders
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 Environmental Services
 Board Members/Trustees
 HCBS
 Independent Living
 Assisted Living
 Nursing Home

Thursday, May 4 • 8:45 - 10 a.m. | General Session

Pursuing Life with Purpose and Passion

Richard L. Deming, MD, Medical Director, MercyOne Cancer Center and Founder, Above + Beyond Cancer, Des Moines

Sponsored by: BrownWinick Law Firm

✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓

Thursday, May 4 • 10:15 - 11:15 a.m. | Breakout Sessions

501: Legal Updates You Must Know: State and Federal Updates for Senior Services Providers

Alissa Smith & Katie Cownie, Dorsey & Whitney LLP

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502: The "Cost" of 100% Occupancy: Teach Sales Directors to Think Like Operators to Grow NOI

Julie Podewitz, Grow Your Occupancy

✓ ✓ ✓ ✓ ✓ ✓ ✓

503: Strategies to Reduce Adverse Dementia Sequela without Pharmaceuticals: For the Greater Good

Kari K. Brizendine, Select Rehabilitation

✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓

504: Fire Marshal Update for LTC & AL

Jacob Allspach, State Fire Marshal Division

✓ ✓ ✓ ✓ ✓ ✓

505: This Before Anything Else

Julie Thorson, Friendship Haven

✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓

Thursday, May 4 • 11:15 - 12:30 p.m. | Lunch (lunch included)

Thursday, May 4 • 12:30 - 1:30 p.m. | Breakout Sessions

601: If You're Not at the Table, You're Probably on the Menu

Lynn M. Daly, HJ Sims

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602: Building a Stronger Sales Pipeline: The Impact of Outreach

Julie Podewitz, Grow Your Occupancy

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