

## PROGRAM DESCRIPTION

Assisted Living: Leadership Certification will allow the leadership of the assisted living programs from the administrator, manager, and/or assisted living nurse to have an understanding of the core components of a well-managed assisted living program. Obtaining this certification shows a commitment to the tenants, families, and staff that you have the knowledge and experience to take your assisted living program into the future. This program covers the five topic areas identified by the American College of Health Care Administrators for the Certified Assisted Living Administrator. It also meets the DIA rule 69.29(5) that all programs employing a new program manager after Jan. 1, 2010, shall require the manager within six months of hire to complete an assisted living management class whose curriculum includes at least six hours of training specifically related to Iowa rules and laws on assisted living programs. Managers who have completed a similar training prior to Jan.1, 2010, shall not be required to complete additional training to meet this requirement. **This program will allow you to become a Certified Assisted Living Leader through LeadingAge Iowa. You must attend all of the live sessions and on-demand recorded sessions and pass an exam by 80% to receive certification. You must recertify every 2 years by obtaining at least 20 hours of CE credit on the latest educational developments and practices in the field. Twelve hours of this education will need to be LeadingAge Iowa/LeadingAge programs.**

- Review the philosophy of Assisted Living as well as current rules, trends and updates.
- Explore nurse delegation and medication management in the ALP.
- Discuss fire safety and life safety issues for ALP.
- Prepare for surveys and discuss QI/Incident reporting.
- Review the criteria for residency and discharge, clinical management and assessment process, level of care, and service plans.
- Identify funding sources and financial management in AL programs.
- Explain the aging process and dementia, mental health and behavior management.
- Recognize human resources and fair housing issues impacting AL programs.
- Review safe food handling and nutrition and dining services for ALPs.

The LeadingAge Iowa Assisted Living Leadership Certification course 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 two full days of live trainings as well as on-demand, recorded sessions that can be taken anytime/anywhere that internet access is available. LAI recognizes that people want more options when it comes to training delivery models. **The live sessions will be available for attendees to register for either in-person in a traditional classroom model or in a live-streaming, virtual zoom setting.**

## REGISTRATION INFORMATION

Register at [www.LeadingAgeIowa.org/ALCertApril](http://www.LeadingAgeIowa.org/ALCertApril).

### In-Person Location April 6 & 27:

Aurora Training Center, 11159 Aurora Ave., Urbandale

Individual LAI Member Rate	\$550
Individual Prospective Member Rate	\$950

Students wanting the traditional classroom model for live training on April 6 & 27 should use this registration option.

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 Leadership Certification for a 2-year period.

Live sessions are NOT recorded.

Attendees can start taking the on-demand, recorded sessions once registration for the course is completed. All on-demand recordings must be completed before the April 27 live training. The live trainings are scheduled on April 6 and April 27.

Attendees must attend all sessions (2 days of live sessions and all on-demand recordings) and pass an exam by 80% to receive certification. The exam will be comprehensive of the material included in the live sessions and on-demand recorded sessions and it will be administered on April 27 at the conclusion of all sessions.

### Live-Streaming, Virtual using Zoom April 6 & 27

Individual LAI Member Rate	\$550
Individual Prospective Member Rate	\$950

Students wanting to attend remotely for live training on April 6 & 27 should use this registration option. You must login using a computer equipped with a speaker and microphone.

Registration fees include electronic handouts, access to on-demand content once registration is received, one connection to the live sessions, CEU/attendance certificate and Assisted Living Leadership Certification for a 2-year period. The live trainings will NOT be recorded, so you must attend the entire session to receive credit. Splitting or sharing a registration is not permitted.

## CANCELLATION/REFUND POLICY

The online registration deadline is April 4, 2023. No-shows will be billed. Substitutions welcome any time prior to the first day of the event. All cancellations and substitution requests must be emailed to Amy Huisman (ahuisman@LeadingAgeIowa.org). A full refund will be given to all cancellations received 10 or more business days prior to the live program. 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 DIA rule 69.25(5).

## AGENDA FOR LIVE TRAINING

**Attendance at all live session dates and times is required to complete the course.**

### April 6, 2023

8:30 a.m. – 12 p.m.\* **Assisted Living Administrative Rules, Trends and Updates** (Catie Campbell, Department of Inspections and Appeals)

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 – 3 p.m.

**Medication Management** (Julie Johnson, Healthcare of Iowa)

During this presentation, we will cover medication management in assisted living. We will also cover high risk medications, why they are high risk medications, and what you need to be aware of when tenants are receiving high risk medications.

**Nurse Delegation and its Use in Assisted Living** (Julie Johnson, Healthcare of Iowa)

Nurse delegation and its use in assisted living will be reviewed. The role of the assisted living nurse and direct care worker will be presented and how delegation can be used effectively.

3:15 – 4:30 p.m.

**Philosophy of Assisted Living** (Kellie Van Ree, LeadingAge Iowa)

This session will discuss the philosophy and background of assisted living. The principles of assisted living will be reviewed along with a comparison of assisted living to other residential programs. The basic concepts of choice, independence, privacy, individuality, and dignity will be discussed.

**Survey Trends** (Kellie Van Ree, LeadingAge Iowa)

This session will review the most commonly cited insufficiencies of assisted living programs. Best practices for successful surveys will also be discussed.

### April 27, 2023

8:30 – 10 a.m.

**Fire Safety/Life Safety** (Curt Seddon, Iowa Department of Public Safety)

This session will provide the assisted living manager 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.

10:15 – 11:45 a.m.

**Criteria For Residency and Discharge** (Denise Wiederin, Friendship Haven)

This session will focus on and provide an overview of the admission and discharge criteria. Case scenarios for admission and discharge criteria will be provided. Tenant contract and rights will be reviewed as well as the financial management of tenant funds and working with tenant families.

12:15 a.m. – 3:30 p.m.\* **Preparing & Responding to Survey** (Stacy Hejda, Healthcare of Iowa)  
This session will cover best practices for instituting pro-active strategies to meet and exceed state standards to assure continuous compliance and high standards of care. It will also provide a first-hand account of Iowa's assisted living facility survey process and detailed information on the rules of enforcement and appeal rights.

**QI/Incident Reporting** (Stacy Hejda, Healthcare of Iowa)  
This session will review investigative processes that an assisted living program should put in place with potential dependent adult abuse situations. Topics covered will include how to identify possible issues and how to conduct an appropriate investigation.

3:30 - 4:30 p.m.

**Exam**

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

## ON-DEMAND RECORDED CONTENT

**All on-demand recorded content will be accessible upon receipt of registration and must be completed by April 27.**

**Role of the Assisted Living Manager** (Denise Wiederin, Friendship Haven)

The role of the assisted living manager is vital to the success of the assisted living program. This role and the delivery of quality service to tenants will be reviewed. 50 minutes

**Assessment Process/Level of Care/Service Plans** (Kristi Eley, Cedar Place Assisted Living, Bethany Life Home Services)

This session will help you in understanding the assessment process as it relates to the assisted living program and how it has been challenging for assisted living facilities. This process, along with level of care and service plans, will be reviewed. Examples of service plans and admission applications will be included in this session. 45 minutes

**Clinical Management** (Kellie Van Ree, LeadingAge Iowa)

This session will focus on medication management, including self-administration, medication error prevention, medication monitoring, and storage. Infection control and coordination of care for the tenant will be reviewed. 60 minutes

**Nurse Delegation** (Kathy Weinberg, Iowa Board of Nursing)

Nurse delegations as identified by Iowa Board of Nursing and the Nursing Practice will be reviewed. 25 minutes

**Funding Sources in Assisted Living** (Stacy Hejda, Healthcare of Iowa)

A review of a variety of state and federal funding sources to pay for room, board, and services within affordable assisted living is covered. Guidance on structuring contracts and service plans will be included to allow access to government-funded programs. 95 minutes

**Hospice and Assisted Living** (Cyndi Rohret-Schmidt, Iowa Healthcare Collaborative)

This session will cover a multitude of topics including hospice, advance directives, living wills, pain management, comfort and dignity, and family support. 65 minutes

**Dementia, Mental Health & Behavior Management** (Sue Schmitt, The Meth-Wick Community)

An overview of dementia care in the assisted living program will be provided as well as the importance of effective communication and behavioral intervention. Behavioral management strategies will be provided. Making activities meaningful and the importance of staff and family interactions will also be addressed. 85 minutes

**Aging Process**

The aging process has an impact on the assisted living community. A review of the physical, psychosocial, and basic needs of the elderly and disabled along with activities of daily living (ADLs) will be provided. 20 minutes

**OSHA and Health Care Providers** (Ken Arp, IOSHA Consultation and Education)

This session will review OSHA standards for assisted living programs and what has been cited within the state. An update of any new issues surrounding OSHA will be provided. 65 minutes

**Human Resources** (John Griffin)

Human resources for the assisted living manager will be the focus of this session. Hiring and training staff and developing personnel policies and procedures will be reviewed. 80 minutes

**Marketing** (Amber Jedlicka, The Meth-Wick Community)

This session will provide the role the assisted living manager plays in the marketing plan. Tenant turnover, marketing plans, and affordability will be included in this session. 55 minutes

**Nutrition and Dining in AL** (Julie Halfpop, Martin Bros. Distributing)

Nutrition services in the assisted living program covers many different areas including menu and meal planning. This session will review preparing menus, food storage, cleaning techniques, and much more. 65 minutes

**Safe Food Handling** (Julie Halfpop, Martin Bros. Distributing)

Food Safety is critical in the assisted living environment. Regulations will be covered in this session. A discussion of food safety violations trends will be reviewed. 45 minutes

**Financial Management** (Steve Givens, Ryun Givens & Co., PL)

This session will include the basics of general accounting for assisted living managers. A review of the revenue cycle and financial statements will also be covered. 40 minutes

**Fair Housing Issues Impacting Assisted Living Facilities** (Scott Moore, Baird Holm LLP)

This session will cover fair housing issues that impact assisted living facilities. Topics to be presented include the basic framework of fair housing laws and how they apply to assisted living facilities, hot issues that are of concern to AL programs, and monitoring and being involved in the enforcement action of federal governments, state governments, and fair housing groups across the country. The Fair Housing Act, Section 504 of the Rehab Act of 1973, Americans with Disabilities Act and reasonable accommodation will be covered. 60 minutes

## CONTINUING EDUCATION CREDIT

**Nursing Home Administrators** – 28.25 contact hours will be awarded for attendance at the entire event. This program is intended to meet the criteria established by the Iowa Board of Examiners for Nursing Home Administrators. You must attend the entire program to receive credit. No partial credit allowed. Retain certificate for four years.

**Iowa Board of Nursing Provider #67** – 28.25 contact hours will be awarded for attendance at the entire event. Providership regulations do not allow for partial credit to be given for any portion of this program. You must attend the entire program to receive credit. Retain certificate for four years.

**For other long-term support and service provider professionals 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. Most also require information objectives, date/time of presentation, agendas, faculty bios, and number of hours earned. If you require information for this purpose, please contact [Amy Huisman](#) in advance for assistance.

## FACULTY

**Ken Arp** has 15 years' experience working as a senior industrial hygienist for the OSHA program in both consultation and enforcement. He also conducted air monitoring for the World Trade Center cleanup and provided compliance assistance for the Katrina disaster relief operation in the New Orleans area.

**Catie Campbell** has been with the Department of Inspections and Appeals as a program coordinator 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.

**Kristi Eley**, RN, is nurse manager for Cedar Place Assisted Living and Bethany Life Home Services. She started her nursing career at MGMC on the oncology unit in 1991. After working there for 3 years, she transferred to Homeward Hospice of MGMC and provided nursing care and bereavement care for 14 years. In 2007, Kristi came to Bethany Life as the Cedar Place Assisted Living nurse. She has enjoyed providing care in people's homes over the many years she has been a nurse.

**Steve Givens** is a managing partner of Ryun, Givens, & Co., P.L. which has a client base that is predominantly health care related – nursing facilities, skilled nursing facilities, CCRC's, etc. He is a partner in charge of Ryun, Givens, & Co., P.L. Health Care Practice and has 30 years' experience in providing auditing, tax, consulting, and Medicaid and Medicare cost reporting. Fiscal consultant to the Iowa Department of Human Services Division for Medical Services – Medicaid Reimbursement – 1986 – 2005.

**John Griffin** joined Lifespace Communities Inc. in January of 1993 as a facility director of human resources and retired in 2011. He became corporate director of human resources in May of 1994. John has more than 40 years of experience in the field of human resources. He has been a member of the Advisory Council to the Equal Employment Opportunity Commission since 1998 and has investigated employment discrimination charges for the Iowa Civil Rights Commission. He has taught human resources management at the college level for four years as an adjunct instructor and was honored as the Outstanding Adjunct Faculty Member. John holds a bachelor of arts degree in economics from St. Francis College in New York and has done graduate work in economics at Texas Tech University. He served as a founding member of the LeadingAge Human Resource Steering Committee and served as the vice-chair of the Iowa Governor's Conference on the Aging Steering Committee.

**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 operations director of home and health services for the Meth-Wick Community. Amber has 14 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. 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).

**Julie Johnson** received her RN at Des Moines Area Community College. She has been a nurse consultant with Healthcare of Iowa, formerly Assisted Living Partners since June 2019. In her capacity, she completes regulatory compliance reviews, providing written reports with recommendations on improving assessments and tenant charts. Julie also goes to assisted living communities as an RN completing assessments, updating service plans, and implementing new systems. She has worked in long term care for many years (15+) serving as a director of nursing and director of assisted living. She is currently working on her BSN in nursing through Grand Canyon University.

**Cindi Martin** is the assisted living program manager at Timberland Village in Story City. Timberland is part of Bethany Life. Cindi holds a bachelor of science degree in education from the University of South Florida in Tampa. Cindi has been with Bethany Life for 17 years and has been assisted living program manager at Timberland the last 7 years.

**Scott P. Moore** is a partner in the labor, employment and benefits section of Baird Holm LLP. Scott is widely recognized as a national expert in housing law and litigation. He represents individuals, developers, property management companies, nonprofit associations, real estate agents, architects, and engineers in all fair housing and public accommodation matters.

**Cyndi Rohret-Schmidt**, MHA, MEd, BSN, CHPN, CHPCA, is a registered nurse with more than 35 years' experience. She has worked the continuum of life from "womb to tomb". She started her career in pediatrics and currently still works in end-of-life care in hospice and palliative care. She is a certified hospice and palliative care nurse. She also works full-time as an improvement advisor for the Iowa Healthcare Collaborative (IHC). Her responsibilities are to be a resource, educator, and support to hospitals and health care organizations in the state of Iowa and parts of Illinois. Primary goal is to increase awareness and knowledge of patient safety and promote a climate of quality patient care.

**Sue Schmitt**, director of health services at Meth-Wick Community in Cedar Rapids, has been a nursing home administrator for 17 years but has worked with programs and services for elders since 1986. Sue began as a case manager, then became an elder protective worker in the Massachusetts state home care system. Since moving to Iowa in 1990, Sue has worked as a social worker, assisted living director, and as a human resources specialist working on staff recruitment and retention before becoming an administrator. Sue holds a BA in English and Communications from the Massachusetts College of Liberal Arts. As director of health services, she is the administrator of The Woodlands, Meth-Wick's 65-bed skilled nursing facility. She also oversees the operation of two assisted living programs.

**Curt Seddon** is a fire inspector with the Iowa State Fire Marshal Division of the Iowa Department of Public Safety. Curt has been employed with the Iowa Department of Public Safety since 1996 and had served as a Gaming Enforcement Officer with the Iowa Division of Criminal Investigation and as an Iowa State Trooper before transferring to the State Fire Marshal Division in 2006. Curt's employment duties with the State Fire Marshal Division have included fire investigations, fire inspections and assignment as a bomb technician with the State Fire Marshal Bomb Squad. His primary job function currently includes inspections of various types of occupancies to include: health care facilities, assisted living facilities, colleges/universities, public/private schools, state correctional facilities, city/county jails, daycare facilities, and complaint inspections on other types of occupancies.

**Kellie Van Ree** is the director of clinical services 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.

**Kathy Weinberg** has been a nurse for more than 30 years. She received her diploma in nursing from Mercy School of Nursing in Des Moines, her baccalaureate in nursing from Grand View University, and her masters of science in nursing from Drake University. Kathy has held a variety of nursing positions. She has worked as a cardiac nurse, a nursing education faculty member, a school nurse, and an emergency room nurse. Kathy has been employed with the Iowa Board of Nursing since 2003; she was initially hired as the associate director of practice/education. She was appointed executive director of the Iowa Board of Nursing in June of 2013.

**Denise Wiederin** is the director of corporate compliance for the assisted living and independent living at Friendship Haven in Fort Dodge. For more than 30 years, Denise has worked in the social work arena of Friendship Haven, including 12 years as the director of social services for the nursing facility. Denise handles the day-to-day processes and procedures in the River Ridge Assisted Living, along with developing the policies for the assisted living neighborhoods of Friendship Haven and works closely with the marketing office. She has a degree in human services and extended education on dementia and memory loss.

## WHAT DO PEOPLE SAY ABOUT THIS CLASS

Attendees raved about this class in the past. Following are just some of the comments:

*"Being new to my role, this was such a great overview of the entire program. Well presented and informative."*

*"Enjoyed the presentations and use of real life examples to illustrate information."*

*"Great information - provided clarity on a few things!"*

*"Speakers were very knowledgeable."*

*"The speakers shared great insights and practical experiences."*

## 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.

## UPCOMING EDUCATION

April 6	Assisted Living Nurse Delegation
May 3-4	Spring Conference & Solutions Expo, Altoona