Together Forward

Supporting older adults live more meaningful lives is not just an end goal — it's a journey. To continue on that journey, you need a conference that's created for leaders like you, a forum where you can discuss the tough moments from the last year, hear ideas that'll transform your organization, and make sure you're ready for the next wave of innovation in the aging services field. This past year we came ***together*** in the way we could, please join us in 2021 as we find opportunities to move us ***forward***.

This year's virtual conference theme is ***forward***, and it speaks to our hope and optimism as we begin to emerge from the global COVID-19 pandemic toward what's next. To move ***forward*** doesn't mean to push past what we have been through and try to return to life exactly as it was before. On the contrary, to truly move our organizations forward, we must leverage our experience to become stronger and smarter. We will need to evolve to meet the challenges ahead by bridging where we have been with new skills and knowledge and look ***forward*** to a new future. We understand ***forward*** means a better tomorrow is not promised — it has to be created.

The 2021 experience in May is 100% virtual, offering the ultimate in flexibility, choice, and value. Join us in moving ***forward*** on May 4-6 for the second edition of LeadingAge Iowa's Virtual Conference. ***Together*** we will move our organizations and the field of aging services ***forward***. We're excited about the content offered in this virtual conference focusing on the most popular topics and session speakers. You'll also find exciting content targeted for dietary, environmental services/facilities management, human resources, marketing/sales, life enrichment, and social workers in the coming months. For example, *Selling During a Pandemic* is scheduled on April 21 and features expert speaker Michael Marlow taking a deep dive into the critical role of selling in the senior living industry. Check the **LAI Events Calendar** as more programs are finalized and published!

Tuesday, May 4

11 a.m. – 12 p.m. General Session

Rethinking Care for Older Adults: WHO Guidelines on Community Level Interventions
Sponsored By: Dorsey & Whitney LLP
You don't have to be a neuroscientist or gerontologist to understand how to support healthy aging brains and bodies. Join Neuroscientist Dr. Kelly Tremblay as she makes this science simple. This session will introduce you to the World Health Organization's (WHO) Guidelines for Integrated Care for Older People (ICOPE) and how you, as a community stakeholder, can make a difference in six priority areas. Discover how ICOPE takes a community-based approach toward person-centered health and social care to optimize the functional ability of older people.

- Identify six simple strategies for integrating the WHO's ICOPE program into the community care model.
- Outline evidence-based recommendations that can help prevent, slow, or reverse declines in the physical and mental capacities of older people.
- Optimize the functional ability of older people through a community-based approach toward person-centered health and social care.

Dr. Kelly Tremblay, PhD, Audiologist, Neuroscientist, Author, Founder, Lend an Ear Consulting
Dr. Kelly Tremblay worked as a tenured professor of neuroscience and audiology for more than 20 years. She's also a contributor to The World Health Organization "World Report on Ageing and Health" published in 2015 and "Guidelines for Integrated Care for Older People" and its toolkit. She judges research grants for the National Institutes of Health Communication Disorders Review Committee. Dr. Tremblay believes that advocacy and action are inseparable from one another. To that end, she offers coaching and consultancy to help the aging world stay productive and socially connected through technology and psychology.

Tuesday, May 4

1 – 2 p.m. Breakout Sessions

111
Legal Updates for Aging Services

> This session provides an update on new laws, cases, and guidance impacting aging services providers.

The presenters are health care attorneys who regularly represent and advise providers of long-term care and aging services. This session will provide a description of recent laws and regulations impacting long-term care and aging services providers, as well as real world illustrations of their impact. The presenters will also explain new state and federal cases, settlements, and agency guidance, along with tips and takeaways from each. Finally, the session will include a discussion portion for questions and answers to address the applications of the new laws.

- Review new federal and state statutes and regulations governing long-term care and aging services providers.
- Describe recent cases, settlements, and agency guidance impacting long-term care and aging services providers.
- Identify tips and recommended practices to comply with new laws and avoid legal pitfalls.

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
Katie Cownie has worked on business and corporate issues for more than 20 years. Many of the clients she works with are involved in health care in some fashion. Her clients include long-term care facilities, hospitals, mental health providers, physicians, and dentists. In addition to her health care expertise, she has spent many years working with clients in the renewable fuels area. She provides representation related to entity organization, contracting, and raising capital.

112
Leading a Culture of Service Excellence

Review key components of a culture of service excellence and positive messaging. Service excellence is brought to life by team members who are professional, courteous, informed, engaged, passionate, and proactive in meeting the needs of residents and family members… and who smile, have a sense of humor, are compassionate and empathetic, and live the values of the organization every day. Communication with heart and with an intent to understand the person's need, concern, or question requires active listening, acknowledgement, and focused action and follow-up. This presentation will provide strategies for developing a culture of service excellence and techniques for positive messaging when faced with challenging questions.

- Define a culture of customer service and service excellence.
- Describe strategies for understanding and managing resident and family expectations supporting organizational culture for resident-centered care delivery.

- Summarize proactive. action-driven positive messaging and complaint management.

Cyndi Siders, RN, MSN, CPHRM, DFASHRM, CPPS, CWCA, Executive Consultant, Siders HealthCare Consulting, Grand Forks, ND
Cyndi Siders has more than 30 years of health care, administrative and insurance experience, 25 of those focused on risk management and patient safety. Her responsibilities as CEO and executive consultant of Siders HealthCare Consulting, LLC, include providing customized risk management and patient safety professional consultation and strategic support, coaching, mentoring and education for health care organizations and health systems; risk management companies, insurance and claims management companies, and insurance agencies. Siders is a distinguished fellow with the American Society for Healthcare Risk Management, a certified professional in health care risk management from the American Hospital Association, a certified professional in patient safety from the certification board for professionals in patient safety, an advanced master trainer in TeamSTEPPS, and a Certified Work Comp Advisor. She is current president of the North Dakota Society for Healthcare Risk Management and serves as faculty for the ASHRM Health Care Risk Management Certificate Program. Siders is a frequent state and national speaker on a variety of risk management and patient safety topics and has authored several national publications.

113
Leveraging COVID-19 Shortfalls through Effective PDPM Strategy

Leverage effective strategies of successful SNF providers during 2020 and 2021 to increase accuracy of PDPM rates and impact daily per diems.

2020 and 2021 have been among the most challenging for SNF providers, with the onset of both COVID-19 and Patient Driven Payment Model (PDPM). Many providers are struggling just to stay afloat with the increased costs due to managing the needs of residents and associated expenses during the pandemic. Learn effective strategies leveraged by skilled nursing facility (SNF) providers during 2020 and 2021 to increase the accuracy of PDPM rates. These proven strategies helped SNF providers recoup some of the census losses and increased costs due to COVID-19. Understand how your organization can leverage these strategies to support the ongoing needs of your community.

- Detail strategies that can impact the accuracy and reimbursement of SNF providers under PDPM.
- Recognize how providers have repositioned to increase census even during the pandemic by targeting increased acuity residents with exceptional quality care.
- Outline how EMR configuration can drive accurate PDPM rates and improve workflow for administration.

Melissa Brown, Chief Operating Officer, Gravity Healthcare Consulting, Cumberland, MD
Melissa Brown is the chief operating officer with Gravity Healthcare Consulting. An occupational therapist with more than 15 years of experience across the health care spectrum, Brown specializes in skilled nursing and long-term care settings. A self-described "PDPM Nerd", she has studied more than 3,500 pages of regulations and guidance from CMS to supply providers with key strategies and analysis for success under the payment model, while always

striving for excellence in care. She has served as a clinical liaison and compliance officer for several rehabilitation services companies and is the host of the Gravity Healthcare Hacks Podcast. She specializes in strategizing through regulatory changes and burdens to help communities provide outstanding clinical care while achieving operational success.

Tuesday, May 4

2:45 – 3:45 p.m. Breakout Sessions

121

Shaping Culture Influenced by Leaders' Personalities

To understand how as leaders, our personalities, strengths, and weaknesses influence culture.

During the eight years of serving as CEO of Friendship Haven (FH), Julie will share how she has grown as a leader, acknowledged her strengths and weaknesses along with her personality, and reveal how that has influenced the overall culture of FH. She will share both the positive and negative impact this has had on the community and share stories as identified through team members, former team members, residents, and families about when culture has been tested. This session will take a very personal look at leadership development and growth of one LeadingAge Iowa organization. We will discuss lessons learned, share struggles, and celebrate victories together. A part of this session will be dedicated to live discussion.

- Describe and identify tools for identifying one's strengths and weaknesses.
- Connect the development of one's leadership strengths to the culture of the organization.
- Practice and demonstrate how others may work to infuse their own strengths/weaknesses and personality to impact their organization's culture.

Julie Thorson, President/CEO, Friendship Haven, Fort Dodge

Julie Thorson is the current president and CEO of Friendship Haven and has served Friendship Haven in this capacity since 2012. She is currently a coach for the National LeadingAge Leadership Academy and serves LeadingAge Iowa as a co-facilitator for the LeadingAge Iowa Leadership Academy. In 2018 Thorson was selected for LeadingAge's Dr. Herbert Shore Outstanding Mentor Award.

122

Developing Comprehensive Fall and Elopement Management Programs

Describe comprehensive fall and elopement management programs.

As seniors age, the risk of falling, repeat falls, and the risk of significant injury increases. Elopement risk presents a serious health and safety risk for residents. Cases of residents leaving senior care organizations unsupervised have been reported in the media, some involving serious injury or death. DIA has raised concerns related to increased incidents of elopements and falls throughout the pandemic. Comprehensive fall and elopement management programs require a multi-disciplinary team approach, with concurrent assessment, monitoring, communication, and care coordination, while actively engaging the resident and family in interventions to manage resident risk. This session will illustrate case examples, best practice, and survey readiness recommendations that support comprehensive fall and elopement management programs.

- Summarize contributing and causal factors involved with fall and elopement risk.
- Define components of a comprehensive multi-disciplinary fall management and elopement program including team strategies to proactively manage resident safety risk.
- Describe the role of organizational Quality Assurance and Performance Improvement in effective fall and elopement management programs.

Cyndi Siders, RN, MSN, CPHRM, DFASHRM, CPPS, CWCA, Executive Consultant, Siders HealthCare Consulting, Grand Forks, ND

Cyndi Siders has more than 30 years of health care, administrative, and insurance experience, 25 of those focused on risk management and patient safety. Her responsibilities as CEO and executive consultant of Siders HealthCare Consulting, LLC, include providing customized risk management and patient safety professional consultation and strategic support, coaching, mentoring, and education for health care organizations and health systems; risk management companies, insurance and claims management companies, and insurance agencies. Siders is a distinguished fellow with the American Society for Healthcare Risk Management, a certified professional in health care risk management from the American Hospital Association, a certified professional in patient safety from the certification board for professionals in patient safety, an advanced master trainer in TeamSTEPPS, and a Certified Work Comp Advisor. She is current president of the North Dakota Society for Healthcare Risk Management and serves as faculty for the ASHRM Health Care Risk Management Certificate Program. Siders is a frequent state and national speaker on a variety of risk management and patient safety topics and has authored several national publications.

123

Strategies for Dealing with Non-Paying Residents and Difficult Family Situations

This session will provide strategies for increasing the likelihood of collecting for services rendered from the admission process until after the resident leaves the organization.

One of the biggest issues facing long-term care is getting paid for the services provided to residents. Dealing with difficult or uninvolved family members, delays in Medicaid approvals, and an unclear picture of a resident's available resources all contribute to these difficulties. This session will address strategies that a long-term care provider can utilize beginning with the admission process until after the resident's discharge to increase the likelihood of getting paid and/or collecting on services already provided. The session will also address involuntary discharge, other available court processes for collections, and the status of the Governor's executive order regarding involuntary discharges.

- Identify the information to be obtained upon admission to help understand a resident's financial resources and needs.
- Identify potential issues with Medicaid approvals and how delays may affect payment.

- Identify available involuntary discharge and collection/litigation options and which ones make financial sense in particular resident situations.

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.

William J. Miller, Partner/Attorney, Dorsey & Whitney LLP, Des Moines
Bill Miller is an attorney at Dorsey & Whitney LLP practicing in the area of litigation, including pre-suit investigation and negotiation, administrative proceedings, arbitration, and trial and appeal in state and federal court. He has been entrusted with internal investigations and policy and procedure reviews in employment and other contexts. A strong believer that close relationships drive successful outcomes, Bill cultivates connections within and outside the legal field to benefit his clients and community. Combining these relationships with legal skill, Bill is an effective advocate in complex business matters, employment disputes and claims, and personal injury defense for clients in industries at the center of the modern economy including health care, government, and financial services.

Wednesday, May 5

11 a.m. – 12 p.m. General Session

In Forward Motion
To move forward doesn't mean to push past where we have been. On the contrary, to truly move our organizations forward, we must leverage where we have been to become stronger and smarter. In Forward Motion is a keynote presentation by LeadingAge national board chair, Carol Silver Elliott, focused on building on the lessons from the COVID era to help inform change and progress for elder care providers. This session will not only motivate, but also provide ideas to implement. In Forward Motion is for anyone who works in the field of elder care.

- Identify lessons learned from COVID.
- Explain more about resilience and the choices of resilience.
- Recognize the issues of ageism and how they were impacted by COVID.

Carol Silver Elliott, President and CEO, Jewish Home Family, Rockleigh, NJ
Carol is the president and CEO of the Jewish Home Family, a continuum of services for older adults located in northern Bergen County New Jersey. She began her career in acute care and transitioned to the world of elder care services in 2007. She is a past board chair of the Association of Jewish Aging Services and is the current chair of the national board of LeadingAge. She has served on the board of LeadingAge Ohio and is a board member of LeadingAge New Jersey and Delaware. A skilled communicator, she blogs regularly for

LeadingAge and for the Times of Israel. She speaks frequently on both health care and personal growth topics.

Wednesday, May 5

1 – 2 p.m. Breakout Sessions

211

The Changing Landscape of Senior Living

Sponsored by: Lument

Explore the challenges and opportunities that lie ahead for senior living communities. 2020 was an unprecedented year which brought new challenges and opportunities. The pandemic, climate change, and important social issues are continuously changing the marketplace and how we serve our customers and team members. Customer expectations are shifting, and it is critical to stay ahead of these important transitions within, and outside of, our industry. HumanGood President and CEO, John Cochrane, will discuss the impact of these changes on our core business model and what we must do to meet changing consumer demands in 2021 and beyond.

- Explore the challenges that lie ahead for senior living communities.
- Identify our opportunities and why focusing on technology and the customer experience will be keys to success.

John H. Cochrane III, President and CEO, HumanGood, Pleasanton, CA
As president and chief executive officer of HumanGood, John Cochrane is responsible for the strategic direction of the company, overseeing operations and serving as the primary liaison to the HumanGood Board of Directors. HumanGood operates 21 life plan communities and 96 affordable housing communities in eight states, serving more than 13,000 residents. HumanGood is one of the largest nonprofit senior living providers in the country and carries a Fitch rating of A- with a stable outlook on its core California-based credit. Previously, Cochrane worked for Lifespace Communities, where he served as Chief Operating Officer overseeing 11 retirement communities in seven states. Cochrane previously worked as a practicing attorney specializing in real estate and finance. He has his law degree from Northwestern University and a bachelor's degree in political science from Northern Illinois University.

212

Dementia Update Focusing on Early Detection and Prevention

This session explores a dementia update with a focus on early detection and prevention. Join Dr. Yogesh Shah for a session that focuses on dementia early detection and prevention. COVID-19 has brought about an environment where people are living in their homes longer. Going forward, aging services organizations will need to identify dementia biomarkers differently and understand beginning levels of cognitive impairment. Finally, evidence-based lifestyle changes and cognitive vitality will be discussed. Dr. Shah is one of LAI's most popular speakers, especially covering dementia care. You won't want to miss this session!

- Explain cognitive continuum and describe Mild Cognitive Impairment (MCI).
- Discuss the future of assessment and dementia biomarkers.
- Review evidence-based lifestyle changes and cognitive vitality.

Dr. Yogesh Shah, MD, MPH, FAAFM, Geriatrician, Director of Palliative Care, Broadlawns Medical Center, Des Moines
Dr. Yogesh Shah is the founding director of palliative care at Broadlawns Medical Center. Dr. Shah's areas of clinical expertise are mild cognitive impairment (MCI) and palliative and hospice medicine. Dr. Shah earned his geriatric fellowship from the Mayo Clinic. He is triple-board-certified in family medicine, geriatrics, and hospice and palliative care. In March 2013, he was awarded a Fulbright scholarship to develop a palliative care curriculum in Rwanda, Africa. Dr. Shah holds a master's in public health (MPH) from Des Moines University. He has done noteworthy amount of work in the area of social determinates of health (SDOH) in 50314 zip code in Des Moines. Dr. Shah has received numerous awards for his work related to aging and dementia. Recently he was awarded Iowa Juneteenth's Health Practitioner Award and Preceptor of the Year Award by the Broadlawns Medical Center's Residents. He received the Passport to Prosperity Award, which honors individuals who immigrated to the state of Iowa and have contributed significantly to the community.

213
HIPAA Compliance in Today's Digital World

> This session provides a refresher and overview of current HIPAA/HITECH requirements, plus practical advice with respect to electronic communications, electronic devices, business associates, and other common compliance issues.

This presentation will cover the standard HIPAA requirements that apply to health care providers, recent enforcement actions, practical advice on tracking business associates, how to conduct a risk assessment, data transfer and storage encryption, developing and maintaining effective policies, and appropriate training for employees. Special attention will be paid to addressing data breaches and proposed changes to HIPAA in 2021. Electronic devices in resident rooms, such as portals or Alexa devices, will be discussed, including items that require HIPAA-specific protections in order to be allowed in residents' rooms.

- Review the scope of HIPAA, proposed changes, and current enforcement hot topics in this area.
- Discuss when a business associate agreement is required and key terms for a covered entity.
- Understand breach reporting obligations under HIPAA.

Drew Larson, Attorney, BrownWinick Law Firm, Des Moines
Drew Larson practices primarily in the areas of health law, corporate formation and transactions, intellectual property, estate planning, and tax. He represents business clients in various aspects of their operations, including startup organization, financing, acquisitions, contract drafting and negotiation, succession planning, and regulatory compliance. Larson views his role as an attorney as a trusted advisor and partner with his clients, helping to assess

their legal needs and working to provide the most simple, straightforward, and complete answers as possible.

Casey M. Alesch, Associate Attorney, BrownWinick Law Firm, Des Moines
Casey M. Alesch is an associate attorney with BrownWinick. She has a general practice including, but not limited to, litigation, health care, and employment and labor law. She is active in Brownwinick's Health Care and Labor and Employment practice groups. Alesch graduated from Iowa State University with a BS in psychology and minors in human development and family studies. In 2020, she received her JD from the University of Iowa College of Law. Prior to joining BrownWinick as an associate, Alesch was a law clerk for BrownWinick. She is a member of both the Polk County Bar Association and the Iowa State Bar Association.

Wednesday, May 5

2:45 – 3:45 p.m. Breakout Sessions

221
Challenges Bring Opportunity: Pivoting your Community for the Future Through Expansion or Repositioning

Illustrate how a Project Feasibility Analysis provides a roadmap for organizations that are seeking to remain relevant by expanding or repositioning their community for the future.

Evolving consumer expectations, increased regulatory scrutiny, staffing challenges, the COVID-19 pandemic, and census declines are just a few of the myriad of challenges causing many senior living operators to recognize that status quo will not suffice. While incremental change can provide some improvement, often the solution requires a more comprehensive evaluation of your operations as well as what market you are serving and how you are serving them. Where to start? Learn from industry experts how a Project Feasibility Analysis can provide the clarity you and your Board need to assure success today and into the future.

- Review the Project Feasibility Analysis Process.
- Recognize how a Project Feasibility Analysis could benefit your unique community.
- Describe the importance of aligning organizational and financial goals in the pursuit of an expansion or repositioning.

Tom Lemkuil, AIA, NCARB, Lead Project Architect, Community Living Solutions, Des Moines
Tom Lemkuil is the lead project architect at Community Living Solutions. He brings more than 19 years of experience in architectural planning and design, 11 of which are dedicated to senior living environments. He has worked on numerous senior living projects serving as a lead project architect. He prides himself in creative designs that are true reflections of the personalities that inhabit them. His goal is to create environments that are functional as well aesthetically pleasing.

Cory R. Rutledge, CPA, Managing Principal - Health Care, CliftonLarsonAllen, Minneapolis, MN
Cory Rutledge is a principal with the health care group of CliftonLarsonAllen (CLA), specializing in a variety of strategic, financial, and operational services for health care clients across the care continuum. Rutledge has 18 years of experience in providing professional services to health care clients. Over the course of his career, he has developed a passion for helping his clients flourish in a health care climate that requires providers to continuously reinvent themselves. In addition to utilizing his expertise to serve health care clients throughout the country, Rutledge is also a frequent speaker at state and national health care conferences.

222
PDPM Insights: Examining Accuracy through Targeted Auditing & Monitoring

Review common PDPM coding errors and supportive documentation vulnerabilities while focusing on essential auditing and monitoring considerations to promote accuracy and clean claims.

With more than a year of the Patient Drive Payment Model (PDPM) behind us, we can now take a closer look at how MDS coding accuracy and supportive documentation have played a starring role in Medicare reimbursement. During this session, we will review common coding errors and supportive documentation vulnerabilities while focusing on essential auditing and monitoring considerations to promote accuracy and clean claims.

- Identify common coding errors and supportive documentation vulnerabilities related to PDPM reimbursement.
- Define auditing and monitoring.
- Implement effective auditing and monitoring practices through an Interdisciplinary approach to promote and ensure accuracy.

Eleisha Wilkes, RN, RAC-CTA, RAC-CT, DNS-CT, Clinical Consultant, Proactive Medical Review, English, IN
Eleisha Wilkes is a registered nurse and AANAC certified MDS consultant with more than twenty years of experience in long-term care. Wilkes specializes in MDS validation audits, Medicare and Medicaid reimbursement compliance, and competency-based staff education programs. She has presented extensively on the Patient Driven Payment Model and nursing facility readiness under the new reimbursement system.

223
Who's Taking Care of You????
Sponsored by: Community Pharmacy

Explore strategies to help address increased stress, anxiety, frustration, burnout, and other issues related to COVID-19 pandemic.

Throughout the COVID-19 pandemic, we have witnessed increasing numbers of anxiety, depression, loneliness, and other mental health concerns. COVID-19 has had a profound negative effect on the mental health of the nation, especially among those health care workers who are combatting the virus. In a recent survey, 93% of health care workers experienced stress; 86% reported experiencing anxiety; 77% reported frustration; 76% reported physical exhaustion and burnout; and 75% said they were overwhelmed. So…who takes care of the health care worker while they are taking care of the residents? Many times it is being left to the individual to take care of themselves. In this uplifting, positive session, Cat will address what we, as employers, can do to help address these issues for our staff. Suggestions and recommendations for coping strategies to help take care of ourselves during this time will also be discussed. Let's face it…we could all use a little help…

- Identify strategies to help combat the emotional stress experienced by staff and self.
- Discuss coping strategies to help take care of ourselves and our staff during heightened stressful situations like the COVID-19 pandemic.

Catherine R. "Cat" Selman, BS, President and Co-owner, The Cat Selman Company, Vonore, TN
Educator. Motivator. Communicator. Consultant. Author...Catherine R. "Cat" Selman, BS, uses her dynamic personality and compelling presence to spread the message of positive, realistic, and common-sense strategies for the aging services professional. She presently serves as President and Co-owner of The Cat Selman Company, a company specializing in continuing education for health care professionals. Ms. Selman received her degree from Trevecca Nazarene University, with continued graduate work at the University of Southern Mississippi. She was the Corporate Activity & Social Work Consultant for 101 nursing homes in seven states. With more than 35 years' experience in management, education and consultation, Ms. Selman has trained providers and surveyors in all 50 states. Since 1989, she has often been requested by the Centers for Medicare and Medicaid Services (CMS) to sit on stakeholder/expert panels responsible for the revision of surveyor guidance and compliance issues. In fact, Ms. Selman participated in a CMS Expert Panel Group responsible for some of the Surveyor Guidance that is now included in the current CMS RoP. She continues to train State Agencies & surveyors in the Care Planning Process, as well as other requirements regarding process, documentation, and compliance. In demand, and on topic, she is considered an authority in aging services.

Thursday, May 6

11 a.m. – 12 p.m. General Session

Taking it to the Streets, a 45,000-mile Journey of Celebrating Aging

Let's face it, 2020 and the first part of 2021, has left us feeling like we've been working our way through a minefield! The realities of COVID-19 have brought us to our knees, yet we have remained resilient, maintained our poise, and one way or another we'll come out stronger. As we move forward through all these challenges, let's take a break and celebrate some of the reasons we got into the health care arena in the first place. Two story tellers, Jack York from iN2L and the incomparable Larry Minnix, will celebrate the elders we serve through the story of a cross country journey that visited residents all over the land. Independent residents, assisted living residents, and people living with dementia, they all had stories to tell and wisdom to share. You will see through the journey the lives that we nurture every day, lives that will make you laugh, cry and reflect about your own journey into elderhood. We've lived under so much pressure the last year, it's ok to slow down and smile for an hour – you won't regret it! And maybe you'll see some cameo shots of Shannon Strickler😊.

- Showcase multiple examples of the resiliency of aging told through the elders themselves.
- Change the perception of people living with dementia, highlight the joy still to be had.
- Demonstrate the importance of resident/staff interaction in ways outside of the usual job descriptions.

Jack York, Co-founder, It's Never 2 Late (iN2L)
Jack York is co-founder of It's Never 2 Late (iN2L), a company dedicated to helping older adults realize the full benefits of adaptive technology. Originally, York did not envision iN2L as a business; the impetus for what became the company was a philanthropic idea to donate computers to assisted living communities and nursing homes in Southern California. With a 15-year background in the Silicon Valley, he saw a vast potential in fostering these connections, but also saw that conventional technology was too difficult for most residents to use in a meaningful way. As a result, in 1999, York retired as vice president of strategic sales for Vishay Intertechnology and started what has become a successful gerontechnology company, iN2L. He is a sought after national and international speaker on technology being used to create personalized experiences that engage and connect older adults to their loved ones and the world at large, specifically individuals with dementia. As of 2019, the company has a customer base of 3,000 senior living communities spread out across all 50 states. iN2L's work has been recognized by the Wall Street Journal, NPR, and dozens of senior living publications. For more information, visit in2l.com.

Larry Minnix, Author, Past President & CEO, LeadingAge
Author Larry Minnix was CEO of Wesley Woods, a comprehensive senior services organization, and CEO of LeadingAge, a national association of nonprofit providers. He was recognized as a Top 50 Leader by the Non-Profit Times, and Top 50 Influencer of Aging by Next Avenue. When he retired in 2015, LeadingAge named its Leadership Academy after him. He is on the Board of Trustees of AG Rhodes and on the Board of Directors of Trinity Continuing Care. Minnix is a United Methodist clergy. He is married to Dr. Kathleen Wright Minnix, historian and author. They reside in Avondale Estates, near Atlanta, and have two sons and daughters-in-law and five grandchildren. Minnix is a speaker on healthy aging and consults with nonprofits on governance and strategic planning.

Thursday, May 6

1 – 2 p.m. Breakout Sessions

311
Perry Lutheran Home: A Case Study in Long-Term Care M&A Legal Issues in Iowa

This session provides a summary of legal issues in long-term care sales/acquisitions in Iowa through the example of a recent Perry Lutheran Home acquisition.

One pathway to growth is Mergers and Acquisition. This session will be presented in a panel format including attorneys and senior leaders of Perry Lutheran Home who will discuss legal and operational issues in health care acquisitions through the lens of a recent change of ownership in Perry. Learn from their experience as the panelists discuss the state and federal regulatory processes as well as tips for handling challenges that can arise in these transactions.

- Review federal and state regulatory processes for undergoing a change of ownership in Iowa.
- Describe legal risks and risk mitigation options in health care acquisitions.
- Discuss tips and recommendations for structuring transactions as well as real world experiences from those who undertook a recent complex acquisition.

Rev. Max Phillips, MDIV, EMBA, CEO, Perry Lutheran Homes, Perry
Rev. Max Phillips is executive pastor of Christ-Zion Lutheran Church with sites in Perry, Bouton, and Ogden. He has been CEO of Perry Lutheran Homes since 2011 and executive director of Lutheran Family Service, an adoption and mental health counseling organization. In addition to his church and extended care experience, he enjoyed a rich career in business, including top executive assignments with a Fortune 100 company and has served in numerous education leadership and policy roles, including appointments to the State of Iowa Board of Education. His work also includes several other elected and community service positions.

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
Katie Cownie has worked on business and corporate issues for more than 20 years. Many of the clients she works with are involved in health care in some fashion. Her clients include long-term care facilities, hospitals, mental health providers, physicians, and dentists. In addition to her health care expertise, she has spent many years working with clients in the renewable fuels area. She provides representation related to entity organization, contracting, and raising capital.

Melissa Gannon, BSHA, Administrator & Chief Operations Officer, Perry Lutheran Homes, Perry
Melissa Gannon serves as the chief operations officer of Perry Lutheran Homes (PLH) located in Perry, a position she has held since 2019, in addition to being the PLH administrator since 2017. In this position she oversees the day-to-day operations of the PLH independent living, assisted living, and all extended care services provided in their three campuses. Gannon has held numerous positions during her career including several assignments in nursing, business office, and administration. She holds degrees in nursing and administration from Kaplan University and the University of Phoenix. Besides serving Perry Lutheran Homes, Gannon is in charge of Lutheran Family Service Elder Care ministry and has helped establish and open the Jacmel Lutheran Home in Jacmel, Haiti. She serves on the board for LeadingAge Iowa and is a graduate of the LAI Leadership Academy and currently a mentor in that program. Gannon is married and has two young sons.

312
Trauma-Informed Care in a Post-COVID World

Review trauma-informed care as it relates to the implementation of RoPs and beyond COVID-19 for both residents and staff.

Trauma-informed care was implemented as part of RoPs III, but so much has changed since that time, and we still have no guidance. Explore this still-new requirement from a fresh lens as we seek to understand trauma-informed care in a Post-COVID World and how COVID-19 has changed the environment related to trauma-informed care for residents and staff. The session will also provide strategies for successfully moving forward utilizing trauma-informed care efforts.

- Discover what trauma-informed care looks like.
- Identify how COVID-19 has changed the game.
- Explore what can be done to ensure a trauma-informed organization going forward.

Jodi Eyigor, Director, Nursing Home Quality & Policy, LeadingAge, Washington, DC
Jodi Eyigor is the director, nursing home quality and policy in the LeadingAge national office. She is responsible for the analysis of health policy and regulatory changes related to long-term care providers and develops and advocates LeadingAge's position on those issues to members, partners, and federal and regulatory officials. Prior to joining the LeadingAge team, Eyigor spent several years working in a LeadingAge-member nursing home and assisted living residence in Washington, DC.

313
DIA Updates for Assisted Living

DIA will provide current information about deficiencies and related issues for assisted living programs.

This session will provide information on recent updates as well as commonly cited deficiencies for assisted living programs. Focused infection control survey findings also will be reviewed. In addition, DIA will discuss elements of the recent rule changes to Chapters 67, 68, 69, and 70 that affect assisted living programs. Attendees will have the opportunity to ask questions during this session.

- Identify the most commonly cited deficiencies for assisted living programs.
- Discuss the trends that DIA is seeing in assisted living program inspections.
- Explore elements of the rule changes and ways that will affect AL programs.

Linda Kellen, RN, MS, Bureau Chief, Adult Services/Special Services Bureaus, Department of Inspections and Appeals, Des Moines
Linda Kellen has been with the Department of Inspections and Appeals as a surveyor/monitor in the special services and adult services bureaus since 2008 and is now the bureau chief for both bureaus. Kellen is a registered nurse and has a bachelor's degree from Morningside College in Sioux City and a master's degree in administrative studies (health care emphasis) from the University of South Dakota. Prior to joining DIA, Kellen worked as chief operations officer for a brain injury rehabilitation facility in Sioux City and as director of nursing and staff nurse at other facilities in the Sioux City area.

Catie Campbell, Program Coordinator, Adult Services/Special Services Bureaus, Department of Inspections and Appeals, Des Moines
Catie Campbell has been with Department of Inspections and Appeals 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.

Thursday, May 6

2:45 – 3:45 p.m. Breakout Sessions

321
Provider Relief Pandemic Potpourri – Current Issues Impacting Your Financial Operations

> This session covers current issues related to accounting and reporting for the public health emergency relief funding and employee retention tax credits.

In this session, participants will hear from experienced practitioners about the current accounting issues impacting providers during the ongoing public health emergency. How will you successfully report and account for the stimulus fund received under the CARES Act for non-profit providers? The session will address the Payroll Protection Program (PPP), treatment of Provider Relief Funds, and Employee Retention Credits and provide suggestions for how to report for them successfully.

- Address various aspects of the Payroll Protection Program (PPP).
- Recall various aspects of Provider Relief Funds including reporting requirements.
- Outline the impact and other various aspects of the Employee Retention Credit.

John Harned, CPA, NHA, Director, BKD CPAs & Advisors, Springfield, MO
A member of BKD National Health Care Group, John Harned has approximately 30 years of experience working in the senior living industry. His expertise encompasses reimbursement, operational excellence, strategic planning, and many aspects of senior living finance. John is the national coordinator of BKD's life plan communities (CCRCs) practice and focuses on delivering strategic solutions to senior living providers.

Brian Todd, CPA, Partner, BKD CPAs & Advisors, Springfield, MO
Brian Todd is a tax specialist in BKD National Health Care Group and serves as the tax representative on the firm's six-member health care committee. He joined BKD in 1999 and has experience providing tax services to both for-profit and not-for-profit health care organizations. He regularly assists hospitals, long-term care organizations, home health agencies, community health centers, colleges and universities, and other not-for-profit agencies with navigating complex tax issues.

322
One Voice: The Effect of Inter-Team Communication on Quality

> Provide usable skills and insights to begin to bridge your communication silos between teams and reach the pinnacle of organizational communication: one voice.

While communication within a team can be functional or even successful, an organization is ultimately measured by its ability to project a shared, unified voice across many such teams. Achieving this 'one voice' can be a challenge. Individual breakdowns tend to be resolved by a team's strongest-performing members, but an organization's quality is only as strong as the junctions that occur between teams. Here, a strong individual performance cannot overcome. This session will provide usable skills and insights to begin to bridge your silos and reach the pinnacle of organizational communication: one voice.

- Identify communication trends with an impact on organizational quality.
- List the observed traits of a 'communication strategist.'
- Recognize 7 communication pitfalls and match them to an improvement approach.

Dr. Teresa Fair-Field, Occupational Therapy Doctorate OTR/L, Occupational Therapist, Registered/Licensed CDP, Certified Dementia Practitioner, Education Specialist, Select Rehabilitation, Sammamish, WA
Teresa Fair-Field, OTD, OTR/L graduated from Pacific University in Forest Grove, OR, with a bachelor of science in 1993, and from Chatham University with a doctor of occupational therapy degree in 2016. She has worked through the lifespan including acute settings, home health, elder health, and end of life care. Her primary role is education specialist for Select Rehabilitation.

Kathleen Weissberg, MS, OTD, OTR/L, CMDCP, CDP, National Director of Education, Select Rehabilitation
Dr. Kathleen Weissberg, (MS in OT, 1993; Doctoral 2014) in her 25+ years of practice, has worked in rehabilitation and long-term care as an executive, researcher and educator. She has established numerous programs in nursing facilities; authored peer-reviewed publications on

topics such as low vision, dementia quality care, and wellness; has spoken at numerous conferences both nationally and internationally, for 20+ State Health Care Associations, and for 25+ state LeadingAge affiliates. She provides continuing education support to more than 17,000 therapists, nurses, and administrators nationwide as National Director of Education for Select Rehabilitation. She is a Certified Dementia Care Practitioner and a Certified Montessori Dementia Care Practitioner. She serves as the Region 1 Director for the American Occupational Therapy Association Political Affairs Affiliates and is an adjunct professor at both Chatham University in Pittsburgh, PA and Gannon University in Erie, PA.

323
DIA Updates for Long-Term Care

DIA will provide an update for long-term care providers.

DIA will share updates and regulatory trends for long-term care providers with an emphasis on survey trends and information and COVID-19. Insights as to what Centers for Medicare and Medicaid Services (CMS) and the department wants providers to focus on will be reviewed.

- Identify frequently cited deficiencies in long-term care organizations.
- Review the status of surveys and focus areas of CMS related to the transition through COVID-19.
- Discuss the timeline for the release of the Phase 3 Guidance.

Geri Paul, Medicare/Medicaid III LTC Bureau Chief, Department of Inspections and Appeals, Des Moines

Geri Paul first joined the Department of Inspections and Appeals in 2005. Paul has 15 years' experience in evaluating complaints, facility reporting, scheduling long-term care surveys/investigation; and abuse investigations within the Department. Paul obtained her master's degree in Public Administration and obtained State Minimum Qualified Testing certification while working within the department. Paul also has a minor in criminal justice. Paul worked at UnityPoint Health for two years as the regulatory compliance director for hospitals/CAHS prior to her return to the Department as Long-Term Care Bureau Chief.

Mindla White, RN, BSN, Bureau Chief, Department of Inspections and Appeals, Des Moines

Mindla (Mindy) White was employed at a local nursing home in Wisconsin as a CNA when she was in high school. After high school, she went to nursing school and later returned to the same nursing home as a charge nurse on the evening shift. In 1995, White moved to Des Moines and worked at another long-term care facility as an MDS coordinator. She joined the Department of Inspection and Appeals in 1998 and was a long-term care surveyor for eastern Iowa until 2000. In 2000, White was promoted to a compliance officer within DIA and then in 2006 was promoted to a bureau chief. White oversees the surveyors who conduct the recertification surveys in long-term care facilities and also has responsibility for the enforcement actions.

Vicki Worth, RN, BS, Bureau Chief, Department of Inspections and Appeals, Des Moines

Vicki Worth started her health care career as a dietary aide in high school back 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 then DON. Worth gained extensive experience in both management and clinical positions in skilled, intermediate, and dementia specific care units. She joined the Department of Inspection and Appeals in 2014 as a long-term care surveyor conducting recertification and complaint surveys throughout Iowa. Worth was recently promoted within DIA to a LTC bureau chief position. She oversees the surveyors who conduct the recertification and complaint surveys in long-term care facilities.