CALA 2020 ONLINE
FALL FORUM
OCTOBER 28-29
7:45 - 8:25 AM  TOPIC TRACK ZOOM DISCUSSIONS
  ● Sales & Marketing
  ● Resident Engagement & Operations
  ● Dementia Care

8:30 - 8:45 AM  OPENING COMMENTS & EXCELLENCE IN SERVICE AWARDS

8:45 – 9:50 AM  GENERAL SESSION
  ● Resilience in the Time of COVID-19
    Opening Keynote Session featuring Roger Landry, MD

10:00 – 11:05 AM  CONCURRENT SESSIONS
  ● The Ins & Outs of Managing Online Reviews
  ● Assessing & Addressing Security Threats
  ● Engagement Strategies & Activities for Residents with Advanced Dementia

11:15 – 12:20 PM  CONCURRENT SESSIONS
  ● Digital Marketing Strategies to Drive Leads & Boost Revenue
  ● Innovation & Technology Lab: Tech-Enabled Services for Exceptional Customer Experience & Operational Efficiency
  ● Navigating the Nuances of POLST for Residents with Dementia

12:20 – 1:15 PM  LUNCH & ENTERTAINMENT

1:15 – 2:20 PM  CONCURRENT SESSIONS
  ● Hospitality, Healthcare, or Both?
  ● Managing & Mitigating Cal/OSHA Inspections
  ● Innovation & Technology Lab: Training Staff to Help Residents with Dementia Utilize Technology

2:30 – 3:35 PM  CONCURRENT SESSIONS
  ● Innovation & Technology Lab: The Power of Virtual Tours & Customized Messaging
  ● WiFi Woes & COVID Communication Blues
  ● Dementia Care Training through a Cultural Lens

3:45 – 4:50 PM  CONCURRENT SESSIONS
  ● Leading a High-Caliber, Highly Accountable Sales & Marketing Team
  ● Brain-Healthy Dining to Build Immunity
  ● Medical Cannabis & Dementia – Implications & Considerations

4:50 – 5:20 PM  HAPPY HOUR
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### TOPIC TRACKS

#### WEDNESDAY

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WEDNESDAY

OCTOBER 28
7:45 - 8:25 AM

**TOPIC TRACK ZOOM DISCUSSIONS**

Grab a cup of coffee and join your peers in a for a candid discussion around key topics and hot-button issues in one of these key areas:

- Sales & Marketing
- Resident Engagement & Operations
- Dementia Care

8:30 - 8:45 AM

**OPENING COMMENTS & EXCELLENCE IN SERVICE AWARDS**

CALA’s Board Chair Michelle Egerer and President & CEO Sally Michael will address the Forum, its content, and our unique position during and beyond the COVID-19 pandemic as care partners and service providers. In addition, the recipients of the 2020 Southern California Excellence in Service Award will be recognized.

8:45 - 9:50 AM

**OPENING KEYNOTE SESSION**

**Resilience in the Time of COVID-19**

**Roger Landry, MD, President, Masterpiece Living**

This pandemic is an assault that is historic, dangerous, and global, without a foreseeable endpoint. For those on the front line of keeping others safe and healthy, even while they themselves are potential victims, this is a daily burden of enormous magnitude. There are lessons we can learn from 20th Century military medical events in order to prevail over what can be a demoralizing climate of persistent challenges. Resilience – an attainable trait requiring diligence and discipline – is needed at all levels within a community to successfully manage these challenges. Explore the necessary ingredients of resilience based on current research and historic empirical observations and leave with practical strategies to develop and maintain it during these unprecedented times and beyond.

11:15 AM - 12:20 PM

**CONCURRENT SESSIONS**

**Assessing & Addressing Security Threats**

**Josef Levy, Owner, Embassy Consulting Services, LLC**
**Alex Pazooki, Western Zone Leader, Coalition, Inc.**
**Deidre Schonfeldt, Partner, Hanson Bridgett, LLP**

From threats to your physical community to cybersecurity threats, such as hackers, negligent and malicious insiders, and software and smart device vulnerabilities – not to mention the challenges presented by a remote working environment and stretched IT and cybersecurity resources during the COVID pandemic – leaders are constantly challenged to assess and mitigate risk, respond to incidents, and improve policies and procedures in response to incidents. Gain tools, best practices, and guidance to address the most pressing security threats, along with compliance strategies relevant to applicable laws including HIPAA, CCPA, and security requirements during the pandemic.

**Engagement Strategies & Activities for Residents with Advanced Dementia**

**Joyce Simard, Founder, Namaste Care International**

Offering meaningful activities for individuals whose advanced dementia has diminished their ability to participate in group activities can be challenging. Join a memory care expert to explore how to create a calm environment and offer meaningful activities with a loving touch approach that can improve the quality of life for people with advanced dementia—all without adding additional staff, finding a dedicated space, or purchasing expensive supplies. From individualized chairside practices to socially distanced engagement strategies that meet CDC guidance, you’ll gain helpful tools sure to positively impact residents’ quality of life while uplifting and inspiring associates and family members alike.

**Digital Marketing Strategies to Drive Leads & Boost Revenue**

**Sam Ruchlewicz, Vice President of Digital Strategy and Data Analytics, Warschawski**

Take an up-close look at current digital marketing platforms and technologies designed to drive qualified leads, nurture prospects, and ultimately boost revenue. Explore the senior living digital marketing landscape and learn how to ask the right questions, as well as how to avoid common mistakes. Leave equipped with a better understanding of these tools, along with actionable strategies and tactics to reach prospective residents and their adult children at critical “moments that matter” as they navigate the research, discovery, and buying phases of their journey.
INNOVATION & TECHNOLOGY LAB:
Tech-Enabled Services for Exceptional Customer Experience & Operational Efficiency

R Wen Dombrowski, MD, Chief Convergence Officer, Catalaize
BRN Nardo Manaloto, CEO, Catalaize
NAB Lauren Powell, Community Operations Director, Merrill Gardens, LLC

Are you looking for innovative ways to enhance customer experience or optimize operations? Feeling overwhelmed by the abundance of technology vendors to choose from? Join this provider/technology team to reimagine delivery of services to residents and families and learn about a broad array of technologies from within and outside of senior living. Rather than purchasing siloed solutions, discover the importance of developing a comprehensive technology strategic plan and involving end-users in your technology decisions, and gain practical tips for implementation from real-world case studies.

Navigating the Nuances of POLST for Residents with Dementia

RD RD Patty Barnett Mouton, Vice President, Outreach & Advocacy & Program Director, Alzheimer’s Orange County and Hoag Palliative CARES Program

The Physicians Orders for Life-Sustaining Treatment (POLST) document, which communicates a person’s wishes regarding their medical treatment preferences at the end of life, can be a powerfully positive tool in the creation of a resident plan of care. Understanding how and when it should be used for residents with dementia, as well as whom to include, can be complicated and requires experience with the nuances of clinical care at the end of life. Examine how a dementia diagnosis impacts end-of-life care choices and gain helpful insights regarding how to plan a thoughtful POLST and end-of-life care conversation.

12:20 - 1:15 PM
LUNCH & ENTERTAINMENT

Ray Charles said that music is “a necessity...like food or water.” Feel the same? Then bring your lunch and join us for a special musical performance exclusively for attendees. Feed your body and your soul!

1:15 - 2:20 PM
CONCURRENT SESSIONS

Hospitality, Healthcare, or Both?

R Lisa Hulse, RN, Vice President of Operations, Villages of San Luis Obispo
BRN Michelle Nessman, Owner & Chief Strategy Officer, Elite Business Systems

The current pandemic has shown us that senior living needs to take a holistic approach to healthcare and wellness lifestyles. At the same time, traditional medicine and healthcare are seeing they need a little more hospitality in their models. But, how can we accomplish striking a balance while setting and sustaining realistic expectations for staff, residents, and family members? What does this mean for marketing messaging or sales conversations? Who do we collaborate with, what are the implications and opportunities, and where do the lines blur? Join a clinical/operations specialist and a marketing expert as they explore the nuances and implications of the manner in which senior living is portrayed and perceived.

Managing & Mitigating Cal/OSHA Inspections
California-specific session

R Jane Binzak, Vice President of Human Resources, Senior Resource Group
BRN Karen Tynan, Of Counsel, Chair West Coast OSHA Practice, Ogletree Deakins

It goes without saying that the safety and security of residents and teams is top-of-mind—even more so during these unprecedented times. Cal/OSHA has also increased its focus on safety and frequency of inspections, particularly around compliance with COVID-related requirements. Learn key insights to maintain your focus on the safety of residents and staff while increasing your understanding of and compliance with COVID-related Cal/OSHA requirements. Leave better equipped to deal with Cal/OSHA inspections, while reducing the risk of citations or COVID-related litigation.

INNOVATION & TECHNOLOGY LAB:
Training Staff to Help Residents with Dementia Utilize Technology

RD NAB Kelly Ording, Regional Director of Resident Programming, Watermark Retirement Communities
BRN Jack York, President & Co-Founder, iN2L

Today we utilize technology in virtually every facet of our lives. We’re connected 24/7 through email, Skype, smartphones, laptops, tablets, and a myriad of other applications and devices. Yet many older adults, specifically those living with dementia, have been left out of the technology revolution. Join an experienced provider and a tech expert and gain insights and strategies to improve the technology experience for residents living with dementia. Learn how to engage staff to utilize multiple technologies, at various price points, and experience creative ways providers have been utilizing technology throughout the pandemic, both high tech and low tech.
While virtual tours and customized messaging were previously considered nice add-ons, they’ve become indispensable marketing tools during times of limited or no contact due to the COVID-19 pandemic. Already proven to increase time spent on company websites by 15 percent, and identified as extremely important to over a third of families in the decision-making process, those numbers are expected to continue trending upward for the foreseeable future. Join two marketing experts as they demonstrate critical steps and considerations in producing a virtual tour, along with best practices for developing and sending customized messaging that support brand authenticity and provide consumers the next best thing when being there in person isn’t an option.

**WiFi Woes & COVID Communication Blues**

Cindy McCreary, Senior Living Technology Specialist

Now, more than ever before, WiFi has become an integral component of community life, impacting numerous aspects of day-to-day offerings and operations – from staffing to resident engagement and satisfaction, as well as your community’s ability to remain competitive, keep family members and doctors informed, budget, and beyond. Take an up-close look at factors that could influence decisions regarding your next WiFi upgrade or expansion, as well as applications helpful to streamlining delivery of care, managing operations, and more.

**Dementia Care Training through a Cultural Lens**

Margarita Bermudez, Senior Manager, Healthcare and Latino Services, Alzheimer’s Los Angeles

Caring for residents living with dementia, though rewarding, can sometimes be stressful and daunting. Adding cultural and linguistic barriers between residents, family members, and care staff can further exacerbate the challenge. Learn empathetic, ready-to-use dementia training tools that are easy to understand and applicable to a culturally and linguistically diverse workforce. The results will speak for themselves – increased understanding, knowledge, and skills, along with improved overall care delivery.

**Brain-Healthy Dining to Build Immunity**

Ayesha Sherzai, MD, Co-Director, Alzheimer’s Prevention Program, Loma Linda University

Food is a powerful part of our daily life. Not only does it nourish us but it can deliver health benefits and counteract factors—such as smoking, obesity, diabetes, high cholesterol, and high blood pressure—that can increase a person’s chance of developing dementia or other forms of brain disease. What’s more, a brain-healthy diet can help us eat for an improved immune system as well. Learn about the NEURO 9 ingredients of super foods to develop a better immune system and how they can be incorporated into a brain-healthy diet through a cooking demonstration. Take away simple daily lifestyle changes to support an improved immune system and build a better brain and body.

**Medical Cannabis & Dementia – Implications & Considerations**

Matthew Lefferman, DO, Medical Director, Access Healthcare Associates

As medical cannabis becomes more widespread and accepted, requests for the use of this alternative therapy by residents living with dementia is likely to increase. Learn the science behind cannabis therapy and the therapeutic benefits of cannabis use for those with neurologic conditions such as dementia and related behaviors, as well as common conditions such as pain and insomnia. What challenges should you anticipate as you work to ensure regulatory compliance while also respecting residents’ rights? Gain key insights, explore important questions, and consider the implications and impact on your medication management policies and practices as they relate to caring for residents living with dementia.

Grab your beverage of choice and join us for Happy Hour as we are treated to some creative drink ideas by a mixologist.
Moving Forward Together – How COVID-19 is Bringing Us into the Future, Faster

Kim Lear, Founder & Content Director, Inlay Insights

Covid-19, dubbed “the great accelerator,” is bringing us into the future, faster. More workplace autonomy, tech empowered consumers, optimal employee and customer experiences, and a refocus on community are all trends that have been discussed for years. Yet seemingly overnight, we have seen how a pandemic has pushed us forward. Providers are challenged to keep pace with these trends. They are redefining and/or creating new methods for the delivery of care and services to ensure they're on target with meeting residents’ needs and preferences, while simultaneously addressing the very real nuances of COVID-19. Gain critical insights, explore best practices, and walk away with actionable strategies to help you prepare for the changing preferences of your residents, and better engage your workforce.

Taboo Topics in Senior Living

Jane Fleishman, PhD, Certified Sexuality Educator, Speaking Of, LLC

Research has shown that, as longevity increases, older adults are sexually active and consider themselves sexual beings up into their 70s and 80s. Yet, sexuality and other uncomfortable, yet very real and important topics such as mental health and challenging or inappropriate behaviors, can be perceived as “taboo” and to be avoided whenever possible. Learn helpful strategies to support leaders in broaching these topics while offering insightful training in a manner that creates an environment of joy, compassion, and inclusion for residents and team members alike.

Public Policy Update
California-specific session

Heather Harrison, Senior Vice President of Public Policy & Public Affairs, CALA

Since the pandemic began, senior living providers have become familiar with many regulatory bodies, such as the CDC, CDPH, and local Public Health departments. Which new laws and regulations will impact senior living providers? How are state policies related to COVID-19 being made? What have been the biggest challenges and what solutions are in sight? Attend this session to learn more about CALA’s policy priorities related to COVID-19 and beyond.

15 Facets of Executive Presence to Take Your Leadership to the Next Level

Susan Conti, Leadership Performance Coach, Designing Leaders, Inc.

Would you like to radiate a more confident, powerful presence wherever you go? Want to take your Executive Presence (EP) to a deeper level? Join a professional leadership coach with experience in senior living and explore the science behind the 15 facets of EP. Learn how to embrace and develop your EP and appropriately apply your professional influence to lead and develop your team with greater confidence and lasting impact.

INNOVATION & TECHNOLOGY LAB: Exploring Safety Innovations to Reduce Risk & Improve Efficiencies

Liz Jensen, RN, Clinical Director, Direct Supply, Inc.
Justin Smith, Innovation & Technology Manager, Direct Supply, Inc.

Resident and staff safety has been a long-recognized priority for providers, including infection control and falls which are leading causes of adverse events, hospitalizations, and increased costs due to regulatory citations, increased insurance premiums, and litigation claims. Hear about barriers to innovation, along with problem-focused vetting that incorporates clinical, operational, and engineering expertise to save time, resources, and money for providers and developers. Explore the latest emerging safety innovations in infection control and fall reduction and the problems they are solving.
Beginning & Ending Residencies – Navigating Challenging Issues

Lori Ferguson, Partner, Hanson Bridgett LLP
Payam Saljoughian, Senior Counsel, Hanson Bridgett LLP
John Tsumura, Partner, Wilson Getty LLP

Sometimes circumstances arise when a resident must be asked to leave the community. Identifying potential problems before a prospective resident moves in is the best way to avoid such situations. When problems do arise, knowledge of the applicable statutes and regulations and some creative thinking are required. Join these legal experts as they discuss red flags which can signal problems ahead, applicable legal requirements, and practical tips on how to comply with regulations while dealing with challenging issues. Specific focus will be given to situations in which the resident’s change in condition or conduct is inconsistent with continued residency.

Leading Drama-Free Teams through Change

Dennis McIntee, Owner, Leadership Development Group

There are outstanding opportunities for individuals and organizations to grow, yet leaders still face hurdles, many of which are internal rather than external. According to research by Bain & Company, 85 percent of executives say their greatest barriers to achieving growth objectives actually lie inside their own four walls. Because senior care is changing, it is imperative to continually modulate your thinking to deal with the uncertainty that accompanies change. Discover three mindsets needed to lead through change, along with strategies to more effectively manage and retain today’s more diverse, shorter-term workforce.

1:15 - 2:20 PM
CONCURRENT SESSIONS

Games Brains Play – Bringing Gamification to Cognitive Wellness

Cynthia Green, PhD, Founder & President, Total Brain Health

Explore and witness firsthand the role cutting-edge gamification can play in brain training as you consider the science, benefits, and limitations of a range of approaches, including puzzle methods, computer-based, social, and socially distanced training models. Discover the tremendous potential of current and future game-based approaches, and best practices for implementing and igniting the full potential of cognitive wellness programs at your community.

INNOVATION & TECHNOLOGY LAB: “Tech-Talk” – Emerging Communications Tools

Rachael Blucher, Senior Counsel, Hanson Bridgett, LLP
Deidré Schönfeldt, Partner, Hanson Bridgett, LLP
Lever Stewart, Chief Operating Officer, Accushield
Peter Yewell, Co-founder & COO, Outpatient Inc.

Join leading technology and privacy experts for an interactive demonstration of two innovative technologies that are solving challenges presented by the COVID-19 pandemic, including: screening visitors and third-party caregivers, communicating quickly and appropriately with families and others regarding a resident’s condition and care needs, and tracking the presence of residents and visitors in the building. Examine how communities must maintain the privacy of resident information and provide practical solutions to comply with legal and regulatory requirements, including HIPAA, CCPA, and CMIA, to secure the data collected by these programs.

Staying Power – Secrets to Achieving Greater Staffing Stability

Cara Silletto, President & Chief Retention Officer, Magnet Culture

In today’s new work world, some of the workforce is made up of deep-rooted, dependable staff, but a number of positions continue to be affected by turnover. Join a workforce thought leader as she shares insights on today’s unique staffing challenges as well as additional ways to gain greater staffing stability and organizational sustainability moving forward. Learn how to more effectively manage the impending shorter-term workforce and maximize the time you have with each employee, and ultimately become a M.A.G.N.E.T. employer who attracts better applicants and keeps staff longer.
2:30 - 3:35 PM
CONCURRENT SESSIONS

Spiritual Care & Grief Management Principles for Senior Living Professionals

Robert Drake, Clinical Chaplain & Medical Outreach Manager, Compassion & Choices

Join an experienced chaplain as he shares real-world clinical cases and spiritual care principles to support the emotional needs of residents, family members, and staff. Discover how understanding the mechanisms and processes of suffering, loss, death, and grief can help providers more effectively empathize, reach, and care for residents and their families. Leave with tools and strategies to cope and deal with suffering and deaths, and support your team during these trying times where COVID-19 has altered our traditional ways of grieving and mourning.

Managing Workers’ Compensation Instead of Workers’ Compensation Managing You

Ken Jackson, Director Workers’ Compensation, Principal, Propel Insurance
Jennifer Macdonald, Workers’ Compensation Claim Manager, Propel Insurance

Join these experienced insurance experts and discover helpful strategies and programs to help improve your community’s workers’ compensation performance – from communication with employees about COVID-19-related and other claims during the initial claim submission to drastic measures for drastic situations, the use of reinforcements, and numerous other community-based management tools. You’ll leave armed and equipped to better manage whatever workers’ compensation challenge comes your way.

INNOVATION & TECHNOLOGY LAB: How Virtual Reality is Changing How We Learn

Carrie Shaw, Founder & CEO, Embodied Labs

Join a technology leader who works at the intersection of health education and virtual reality storytelling and experience the benefits of immersive training tools for caregivers. Discover how VR experiential learning principles can accelerate learning that leads to deeper understand of the subject and significant changes in workplace behaviors and habits. Through renewed empathy and compassion that positively impacts culture, care practices, and perceptions of residents and team members, you’ll see how this cutting-edge technology has the capacity to improve lives.

3:45 - 4:50 PM
CONCURRENT SESSIONS

Forging Partnerships with Hospital Systems & Healthcare Providers

John-Mark Geiss, DO, Founder & CEO, Geiss MED

Join a physician as he sheds light on the inner workings of HMOs, Medicare Advantage Plans, and ACO models, as well as driving factors and Key Performance Indicators (KPIs) for health plans, medical groups, and physicians. Discover how integration of mobile geriatric healthcare has led to a reduction in ER visits and hospitalizations, as well as improvements in resident healthcare outcomes and quality of life. Armed with this information, you’ll be better equipped to forge true partnerships with the healthcare community and hospital systems that can result in better health outcomes and a higher quality of life for residents.

Ask the Attorneys

Doug Armstrong, Counsel, Hanson Bridgett, LLP
Rachael Blucher, Senior Counsel, Hanson Bridgett, LLP
Joel Goldman, Partner, Hanson Bridgett, LLP

This ever-present, though always different session will cover a wide range of legal topics affecting providers. Gain insights from the perspectives of these highly regarded senior living law experts as they discuss recent issues, regulatory trends, and policy changes, as well as address hot-button questions and concerns. You’ll leave better equipped to avoid or address challenges before they become problems.

Making the Most of a Mentoring Program

Pamela Hardesty, Regional Director of Operations, MBK Senior Living
Susan McKeever, Principal, Susan McKeever Consulting, Inc.

Have you considered starting a mentoring program, but aren’t sure where to start or what approach might be best suited to your organization? Join this provider/consultant tandem and learn about mentorships to onboard new leaders, group mentoring, and mentoring for career development. Explore when to invest in technology and how to avoid some of the mentor program pitfalls as you hear lessons learned. Leave with a greater understanding of the varying benefits and discover the capacity to increase job satisfaction and retention.