

# Celebrate Age

2011 Annual Conference  
& Trade Show

September 7-9  
Hyatt Regency Columbus



*LeadingAge*  
Ohio



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# Celebrate Age

2011 Annual Conference & Trade Show

September 7-9

Hyatt Regency Columbus

**2011** is the momentous year when the first of **77 million** baby boomers will **turn 65**, and today's seniors are redefining what exactly it means to be "old."

*This is a generation that can expect to live longer than past generations, tends to be better educated and more financially secure, and has a long history of independence.*

Many of these individuals are living outside of the boxes that society has traditionally put them in and are:

- Working to an older age;
- Heading back to school and starting new careers;
- Volunteering in their communities;
- Engaging in multi-generational activities;
- Taking public interest jobs; and
- Teaching young adults the value of giving back.

This is a great year for LeadingAge Ohio and LeadingAge to *Celebrate Age*, to recognize the gifts of age and raise awareness about the potential our older population has to transform our world.

## LeadingAge Ohio's 2011 Annual Conference and Trade Show offers:

- 1,100 aging services stakeholders from across the country
- 400+ pieces of art by LeadingAge Ohio member residents and clients
- 117 faculty sharing their knowledge to improve quality and advance your mission
- 100+ exhibits featuring the latest products and innovations
- 74 years of service to members and the individuals they serve
- 63 education sessions addressing today's issues
- 27 annual sponsors
- 12 hours of continuing education credits
- 7 official networking and social events

## WHAT'S INSIDE

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# Schedule At-a-Glance

## WEDNESDAY, SEPTEMBER 7

9 a.m. ....	LeadingAge Ohio Foundation Golf Outing
9 a.m.; 12 p.m.; 3 p.m.; 6 p.m. ....	Segway Tours
12 - 3 p.m. ....	Sailing on Hoover Reservoir

## THURSDAY, SEPTEMBER 8

7:30 a.m. - 5:30 p.m. ....	Registration Open
7:30 - 10:30 a.m. ....	Continental Breakfast
8 - 9:30 a.m. ....	Education Sessions
9:30 a.m. - 5 p.m. ....	Art & Writing Show Open
9:45 - 11:15 a.m. ....	General Session
11:15 a.m. - 1:45 p.m. ....	Trade Show and Lunch
11:30 a.m. - 1 p.m. ....	Resident Forum Luncheon
2 - 3 p.m. ....	Education Sessions
3:15 - 4:15 p.m. ....	Education Sessions
4:30 - 5:30 p.m. ....	Education Sessions
5:30 - 6:30 p.m. ....	Exhibitor and Awards Appreciation Reception
6:45 - 8:30 p.m. ....	Awards Celebration

## FRIDAY, SEPTEMBER 9

7:30 a.m. - 5:30 p.m. ....	Registration Open
7:30 - 10:30 a.m. ....	Continental Breakfast
8 - 9:30 a.m. ....	Education Sessions
9:30 a.m. - 3 p.m. ....	Art & Writing Show Open
10 - 11:30 a.m. ....	Education Sessions
11:45 a.m. - 1:15 p.m. ....	Lunch and Annual Business Meeting
1:30 - 3 p.m. ....	General Session
3:15 - 4:45 p.m. ....	Education Sessions

## Continuing Education Information

LeadingAge Ohio, as an approved provider of continuing education through the State of Ohio Board of Examiners of Nursing Home Administrators (BENHA), will provide licensed nursing home administrators with up to **12.0** continuing education units for attendance at general and concurrent education sessions. Additionally, continuing education credits are available or have been applied for from the following certifying boards:

- Accountancy Board of Ohio
- Ohio Board of Nursing
- State of Ohio Counselor, Social Worker & Marriage and Family Therapist Board
- National Certification Council for Activity Professionals
- Commission on Dietetic Registration
- Certifying Board of Dietary Managers

Credit has been applied for through the HR Certification Institute. Other professionals are encouraged to submit detailed information on the sessions attended (LeadingAge Ohio brochure and handout materials) along with their copy of the Certificate of Attendance to their own professional organization for consideration of continuing education credit. Please direct continuing education-related questions to Mary Ann Evans at [maevans@leadingageohio.org](mailto:maevans@leadingageohio.org).

### CREDIT HOURS

Attendees can earn **1.0 or 1.5** continuing education units (CEUs) for completion of conference Education Sessions and General Sessions. A total of **6.0** CEUs can be earned on September 8 and **6.0** CEUs on September 9.



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2002, 2001, 1997,  
1996, 1994, 1993



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Portsmouth, OH  
**FINANCED**  
2009, 2004



**FRIENDSHIP VILLAGE  
OF DUBLIN**  
A Lifesource Retirement Community  
Dublin, OH  
**FINANCED**  
2009, 2004



**EPISCOPAL RETIREMENT HOMES, INC.**  
Cincinnati, OH  
**FINANCED**  
2009



**Eliza Jennings**  
Senior Care Network  
Olmsted Township, OH  
**FINANCED**  
2007, 2001,  
1999



**McGregor**  
Cleveland, OH  
**FINANCED**  
2005, 2001



**Devon  
Oaks**  
Westlake, OH  
**FINANCED**  
2004

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# Conference Highlights

## FOUNDATION GOLF OUTING

WEDNESDAY, SEPTEMBER 7

9 a.m.- 4 p.m.

This year's golf outing will be held at *The Medallion Club* in Westerville. This club offers 27 holes of championship Jack Nicklaus II golf, picturesque ponds, wooded areas and preserve lands. Gather your foursomes and join your colleagues for a day of fun and friendly competition on the links, and support a worthy cause! Your registration for this outing includes a reception and awards celebration. Proceeds benefit LeadingAge Ohio Foundation. The Foundation Scholarship program supports those member employees seeking to further their not-for-profit senior services careers. Registration information is available on the enclosed registration form and online at [www.LeadingAgeOhio.org](http://www.LeadingAgeOhio.org); see "LeadingAge Ohio Golf Outing Registration" under "Education and Events". Be sure to sign up by **August 24** to reserve your place on the golf course and reception that follows. *Separate registration required.*



## SAILING ON HOOVER RESERVOIR

WEDNESDAY, SEPTEMBER 7

12 - 3 p.m.

Relax with your colleagues and make new friends while sailing on Hoover Reservoir. The reservoir is in Delaware and Franklin Counties, just northeast of Westerville. Sail in a flying Scot on 2,818 acres of water. Great view of the lake and area wildlife. No sailing experience necessary. Lunch and snacks included. Separate registration required. Please refer to enclosed registration form.

*Special thanks to Martha Sweterlitsch and Benesch Friedlander Coplan & Aronoff LLP for their sponsorship of this event.*

## SEGWAY TOURS

WEDNESDAY, SEPTEMBER 7

9 a.m.; 12 p.m.; 3 p.m.; 6 p.m.

Enjoy the thrill of riding on a Segway i2 while you discover the charm and history of Columbus. During this two-hour tour you will explore miles of peaceful parkland along the Scioto River, the thriving Short North arts district, the vibrant Arena District and historic downtown. As you glide, your tour guide will entertain you with fascinating and humorous stories about Ohio's Capital city. No experience necessary. Training will be provided prior to your tour. For more information and to register online, visit [www.segwaytoursofcolumbus.com](http://www.segwaytoursofcolumbus.com) or call (614) 222-3005. *Reservations required.*

## LEADINGAGE OHIO'S 2011 TRADE SHOW

THURSDAY, SEPTEMBER 8: 11:15 a.m. - 1:45 p.m.; INCLUDES LUNCH;

5:30 - 6:30 p.m.; EXHIBITOR AND AWARDS APPRECIATION RECEPTION

Come to the trade show for the latest products and innovations in aging services that help you run your organization. LeadingAge Ohio's Trade Show can connect you with the industry partners who can make things happen. Visit with our exhibitors and become eligible for many outstanding prizes, including the LeadingAge Ohio Service Center grand door prize of \$1,000 cash. Just visit your preferred exhibitors and ask them for one of their select raffle tickets and place your entry in the basket at the LeadingAge Ohio booth.



## STATEWIDE ART & WRITING SHOW

THURSDAY, SEPTEMBER 8, 9:30 a.m. - 5 p.m.

FRIDAY, SEPTEMBER 9, 9:30 a.m. - 3 p.m.

Be inspired and celebrate the talents of LeadingAge Ohio member residents and clients at this year's Art & Writing Show. The culmination of seven regional shows, the state display features the prize winning entries in multiple artistic mediums and written categories. Vote for your favorite piece of art on Thursday. Do not miss this year's show!

## RESIDENT FORUM EVENT

THURSDAY, SEPTEMBER 8, 11:30 a.m. - 1 p.m.

The resident forum brings together old friends and forges new ones for LeadingAge Ohio member residents and clients. From viewing the inspiring work of their peers to enjoying a delicious lunch with entertainment, this day is a special event for the older Ohioans who are the focal point of LeadingAge Ohio and its members. Registration information will be sent separately to LeadingAge Ohio members' activity directors for this special opportunity in conjunction with the conference.

## AWARDS CELEBRATION

THURSDAY, SEPTEMBER 8, 5:30 - 8:30 p.m.

Celebrate individuals and not-for-profit organizations that daily exhibit the not-for-profit difference in senior services by attending a very special evening with your colleagues. Enjoy great networking with our exhibitors. Our evening includes a reception, a memorable meal and entertainment. Highlighting the evening will be a tribute to our 2011 award winners with a multimedia program and award presentation. Plan now to come and celebrate the best of not-for-profit senior services.

## BOARD OF DIRECTORS/TRUSTEES PROGRAM

FRIDAY, SEPTEMBER 9, 8 a.m. - 4:45 p.m.

Leaders are encouraged to bring their board leaders to this year's conference for peer networking and learning. Please refer to pages 18 through 21 for the following sessions of particular relevance to boards of directors/trustees: 38D (board composition), 47D (quality, risk and resident safety) and 57D (best governance practices).

## LUNCH AND ANNUAL BUSINESS MEETING

FRIDAY, SEPTEMBER 9, 11:45 a.m. - 1:15 p.m.

LeadingAge Ohio Chair Marcia Hauer and LeadingAge Ohio President/CEO John Alfano will lead the order of LeadingAge Ohio business. The meeting will include the election of directors and various association reports.

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The Advocate Of Not-For-Profit  
Services For Older Ohioans

LeadingAge Ohio is a statewide trade association representing nearly 400 not-for-profit senior housing, health care and ancillary service providers, including adult day care, home- and community-based services, assisted living and skilled nursing providers, as well as medical and supportive services. Members of LeadingAge Ohio are sponsored by religious, fraternal, labor and government organizations committed to providing quality services for facility residents and the community-at-large. These providers care for more than 60,000 older Ohioans everyday regardless of their ability to pay for care. LeadingAge Ohio is affiliated with the Washington, D.C.-based LeadingAge ([www.LeadingAge.org](http://www.LeadingAge.org)).

# LeadingAge Ohio's 2011 Trade Show

**Thursday, September 8: 11:15 a.m. - 1:45 p.m.; includes lunch;  
5:30 - 6:30 p.m.; Exhibitor and Awards Appreciation Reception**

*sponsored by Benesch, Friedlander, Coplan & Aronoff, LLP and Howard, Wershbale & Co.*

Come to the trade show for the latest products and innovations in aging services that help you run your organization. LeadingAge Ohio's Trade Show can connect you with the industry partners who can make things happen. Visit with our exhibitors and become eligible for many outstanding prizes, including the LeadingAge Ohio Service Center grand door prize of \$1,000 cash. Just visit your preferred exhibitors and ask them for one of their select raffle tickets and place your entry in the basket at the LeadingAge Ohio booth.

**Don't miss visiting these exhibitors!**

(2011 exhibitors joining us as of May 31, 2011)

Absolute Rehab  
Aegis Therapies  
Alliance Rehab, LLC  
American HealthTech  
AOD Software  
Basic American  
Medical Products  
Cain Brothers  
CareConnect by Esco  
Technologies  
CHAMPS  
CompManagement  
Health Systems, Inc.  
CompManagement,  
Inc.  
Cooperative Health  
Partners  
Cornerstone Pharmacy  
CTC Technologies,  
LLC  
Deffet Group, Inc.  
Encore Rehab  
EnduraCare Therapy

Management  
Functional Pathways  
HealthMedx  
Heritage HealthCare  
Home Free, Inc.  
Horizon Software  
International, LLC  
Howard Wershbale &  
Co.  
Institutional Care  
Pharmacy  
Integrated Compliance  
Services, Inc.  
Invacare Continuing  
Care  
J + J Invision  
Keane Care, Inc.  
Kwalu  
Lancaster Pollard  
LarsonAllen LLP  
LeadingAge Ohio  
Lifeline Pharmacy  
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Mistick Construction  
Mobilex USA  
Neace Lukens  
Ohio Person Centered  
Care Coalition  
Omnicare  
OnSight Health Care  
Paragon  
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Peoplefirst  
Rehabilitation  
Pharmacy  
Management Group  
PharMerica  
Plante Moran  
Prelude Services  
Premier Therapy  
PrimeSource  
Healthcare  
RDL Architects  
Remedi Senior Care

Pharmacy  
Resource Systems  
Ricop Construction  
RSM McGladrey  
Safeway Safety Step  
Secure Care Systems  
Select Rehab, Inc.  
Seneca Medical  
Senior Resources  
Alliance  
SimplyThick, LLC  
Skilled Care  
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# General Sessions



*Dr. Lance Secretan*

**THE SPARK, THE FLAME, AND THE TORCH:  
*INSPIRE SELF. INSPIRE OTHERS.  
INSPIRE THE WORLD.***

THURSDAY, SEPTEMBER 8

9:45 - 11:15 a.m.

Go on an invigorating, radical and inspiring journey in which Dr. Secretan challenges the very idea of a discipline called “leadership” and proposes, instead, that we first learn how to become inspired (The Spark), so that we can inspire others (The Flame) and create a legacy (The Torch). Be warned! Get ready to be challenged! First, Secretan takes on many sacred cows—mission, vision and values statements, leadership theory, brand management theory, motivation techniques, psychometric profiling, performance management systems and coaching—to name a few, and then describes how alternatives to these ideas have been successfully implemented by some of the greatest organizations in the world. Secretan shares wisdom gleaned from 35 years of research, teaching and working with great leaders globally. He shows us how everyone can be an inspiring leader, create inspiring organizations and change the world.

Dr. Secretan distills complex ideas into simple, easy-to-implement concepts, processes, and exercises that explain how to inspire a team, organization, or country—or your family and friends.

**Dr. Lance Secretan** is the former CEO of a Fortune 100 company, university professor, award-winning columnist and author of 15 books about leadership emphasizing the connection between high performance and the heart, the mind and the soul and inspiration and leadership. Lance is a dynamic, thought-provoking and much sought-after leadership coach, consultant & speaker who ignites individual clients, companies and audiences with his passion. His work results in reinvigorated work environments all over the world.

*\*Special thanks to Cornerstone Pharmacy for sponsoring this General Session.*



*Teepa Snow*

**MAKING MOMENTS OF JOY:  
*IT'S WHAT YOU CHOOSE TO DO  
AS A PARTNER***

FRIDAY, SEPTEMBER 9 - 1:30 - 3 p.m.

Recognize and appreciate the role that their behaviors, words, actions and reactions play in the behaviors that typically seen in people living with dementia. Emphasis will be placed on providing learners with alternative approaches and responses that are effective in promoting more positive interactions and outcomes. The goal is to help caregivers manage their own behaviors to change patterns rather than focusing on trying to get the person with dementia to “behave themselves.”

**Teepa Snow** is an occupational therapist currently working as a dementia care and dementia education specialist. She has an independent practice as well as clinical appointments with Duke University’s School of Nursing and University of North Carolina –Chapel Hill’s School of Medicine. In addition to providing lectures for gerontology and health professional programs at colleges and universities across the country, Teepa works closely with providers across the aging services continuum throughout the US to improve and optimize programs and services to people with dementia and their families. Teepa has over 30 years of experience in geriatrics. She has a strong and varied clinical background including working for long term care facilities, as well as providing direct care in community, home health, long-term care, assisted living and rehabilitation settings. She has worked collaboratively to conduct clinical research in a variety of settings and on a variety of geriatric topics.

SESSION PLANNER	Best Practices and Innovations	Culture Change	Financial Management
<b>Thursday September 8 8-9:30 a.m.</b>	1A Life Care at Home	2B Transforming Long-term Care for Ohio's Citizens	3C Delivering Services Outside the Walls
<b>Thursday September 8 2-3 p.m.</b>	9A Community-based Service Coordination: Connecting Services, Emergency Response and Aging in Place	10B Person Centered Care Plans: Making Them Work for the Resident	11C Managing the Cause and Effect of Balance Sheet Risk
<b>Thursday September 8 3:15-4:15 p.m.</b>	17A Redesigning Dementia Care	18B Beginning the Change to Person Directed Care	19C Opportunities and Challenges in Financing Long-term Care Facilities
<b>Thursday September 8 4:30-5:30 p.m.</b>	26A Council for Life Long Engagement: Working to End Ageism  27A Technology-assisted Cluster Care Model	28B Person Centered Care: It Takes a Village	29C Form 990: Lessons Learned and Challenges Ahead
<b>Friday September 9 8-9:30 a.m.</b>	35A Reducing Hospital Re-admissions	36B Coaching Approach to Communication	37C Learning to Live with Lower Reimbursement: Maintaining your Profit Margin through Operations Improvement
<b>Friday September 9 10-11:30 a.m.</b>	43A Preventing Medication Diversion: How Collaboration Led to Best Practices  44A Using a Holistic, Web-based Assessment Tool to Improve Healthy Aging Outcomes for Community Dwelling and Life Care Community Older Adults	45B Integrating Technology into your Culture Change Journey	46C Regulatory Billing Compliance for CFOs, CEOs and Administrators
<b>Friday September 9 3:15-4:45 p.m.</b>	53A Being the Best you can be Costs Nothing  54A Changing Resistance and Refusals into Positive Interactions and Better Outcomes for All Involved	55B Dining-It's what Makes a Home	56C Maximizing Therapy's Role in Reimbursement

Leadership and Strategy	Management and Operations	Marketing, Philanthropy and Community Relations	Public Policy and Legal Issues	Workforce Solutions and Life Enrichment
4D Healthcare Reform-Up to the Minute and What has Changed	5E Corporate Compliance and Internal Audits: The Game has Changed	6F What REALLY Matters to Engage Visitors to your Website?	7G CCHIT Certification: What Does it Mean to your Facility?	8H Celebrate Age with DISC®
12D Destiny, Character and Calling: Regaining Our Passion and Using it to Inspire Others	13E Behavior Boot Camp: Brainstorming Solutions for Challenging Behaviors in Dementia	14F Cracking the New Normal by Involving Consumers in Decision Making	15G Storms on the Horizon	16H Stress-less: Effectively Cope with Negative and Challenging Behaviors
20D The Medicaid & Medicare Funding Challenge	21E Preparing for Future Technology-Enabled Care Models: A Provider's Case Study	22F Ask Event: Sharing Best Practices in Philanthropy	23G Public Policy Panel	24H The Obama Board-Yes We Can (And We Are)!  25H Keep your Population Engaged and Connected through Volunteer Programs
30D Transforming your Community: the New Way to Increase Occupancy	31E Home Health, Hospice and Community-based Services Update	32F Online Marketing: Keeping Pace with the 21st Century Consumer	33G Life after Reimbursement Cuts: Dealing with your Banker, Vendors and Constituents	34H Next Generation Employee Wellness Programs
38D Celebrate Age with the Right People on the Board Bus	39E Legal, Survey and Enforcement Update	40F Through Their Fingertips: Using the Web Beyond your Website	41G Residential Care Updates	42H Effective Strategies and Proper Documentation for Treating Residents with Dementia
47D Engaging the Board of Trustees in Quality, Risk and Resident Safety	48E I Am the Leader-What Do I Need to Know About the MDS 3.0?  49E Looking Across the Continuum: What do Residents Tell Us?	50F 10 Tips to Maximize the Experience of a Prospect and Encourage Sales	51G Ohio Regulatory Update	52H Proven Best Practices Help Prepare for Future Workforce Demands
57D Governance-Best Practices in Board Leadership	58E Utility Data Management and Retrofits	59F Mind the Gap: Find and Fix Gaps in your Sales Process	60G Let's Make It Personal	61H Chemical Restraint Reduction: How to Modify the Environment to Manage the Behavior Instead of Medicating the Behavior to Fit in the Environment

# Education Sessions

Choose from **61 concurrent education sessions** addressing today's key aging services challenges and passions. See page 9 for information about our dynamic General Sessions. For education tracks, please refer to pages 10-11. Continuing education information is available on page 4.



THURSDAY, SEPTEMBER 8

8-9:30 a.m.

Education Sessions

## 1A Life Care at Home

Kendal at Home has introduced the first continuing care at home program in the state of Ohio. This unique concept offers members the opportunity to take advantage of the benefits a life care retirement community can offer while helping members to remain in their own homes as they age. The key component of this program is care coordination. Each member is assigned a care coordinator when they join Kendal at Home and the goal is to assist them in maintaining or improving upon their health and wellness. If a member should need help for a short period of time or for the remainder of their life, we will provide and pay for the member's care. For the past several years we have demonstrated outstanding results in terms of helping members remain independent and in their own homes. Having served nearly 150 members not one member is currently in a permanent placement in Assisted Living or a Nursing Home. Our strong partnerships with community organizations make serving members in their home possible on an ongoing basis.

*Faculty: Lynne Giacobbe, Executive Director, David Zientarski, Director of Care Coordination, Kendal at Home – Westlake; Ann O'Malley, Chief Financial Officer, Kendal Northern Ohio - Oberlin*

## 2B Transforming Long-term Care for Ohio's Citizens

Director Bonnie Kantor-Burman is helping to lead Ohio's effort to transform health care and long-term care for its citizens. Director Kantor-Burman has advocated for new approaches that emphasize quality, person-centered care while realizing cost savings. Her goals are to reform and enhance the quality and efficiency of our health care system, and to strengthen long-term care options that give elders more choices about their care. She believes in the concept of preventive gerontology, a wellness and behavioral driven model of life and care across the lifespan.

*Faculty: Bonnie Kantor-Burman, Director, Ohio Department of Aging, Columbus*

## 3C Delivering Services Outside the Walls

Proactive senior living providers are increasingly looking outside of their 'walls' to fulfill their missions and visions.

The provision of services to non-residents includes home and community-based services BUT, increasingly, non-traditional services, as well. This session will examine the research that provides evidence of growth in non-residential revenues and will present a series of case studies/examples of organizations thinking 'outside the box' in broadening their missions and enhancing their bottom lines. Ohio providers will be highlighted; non-Ohio examples will also be provided. This session is targeted for the executive who is ready to be challenged to think creatively!

*Faculty: Scott Collins, President/CEO, Link-Age, Mason; Tom Meyers, Managing Director, Ziegler, Chicago, IL*

## 4D Health Care Reform-Up to the Minute and What has Changed

Healthcare reform was passed in 2010 but that was just a portion of the changes that will be effecting Senior Living providers and healthcare in total for years to come. This session follows how healthcare reform came to be but more importantly identifies the changes that continue to occur in the legislation as well as the changing landscape that will develop within the industry. Payment reform, ACO's, bundled payments, pay for performance, resident centered care models, health insurance and "The New Normal" will be addressed in this important discussion.

*Faculty: Chad Kunze, Principal, LarsonAllen LLP, St. Louis, MO*

## 5E Corporate Compliance and Internal Audits: The Game Has Changed

The Health Care Reform Act has now mandated nursing facilities to establish corporate compliance programs and has also passed new provisions regarding the return of overpayments and the suspension of payments in cases of allegations of suspected fraud that are in effect now. These new provisions will be discussed and how they will affect your current operations, particularly in the area of internal audits. The scope and structure of your audit, whether conducted by an internal auditor or an outside consultant, will be reviewed.

*Faculty: Aric Martin, Esq, Rolf Goffman Martin & Lang, Cleveland*



## 6F What REALLY Matters to Engage Visitors to your Website?

Did you know your web site should attract spiders if you want to generate leads? No not the real kind, but the kind that helps people find you. The static billboard websites of yesterday lack luster, engagement and most of all traffic, which is what you need to capture leads. People are on-line searching for senior care services, and you want them to find YOU. Engage in this session and discover how to evaluate your website to determine if it's fully search optimized and ready for visitors. *Faculty: Patty Cisco, President & "Creative Catalyst," CISCO & CO, New Bremen*

## 7G CCHIT Certification: What Does it Mean to your Facility?

Beginning in 2011, the Certification Commission for Health Information Technology (CCHIT) will begin the certification process for Electronic Health Records (EHRs) used by Long Term and Post Acute Care (LTPAC) providers. This will have an impact on long term care providers in several ways including their ability to obtain federal grant funding and economic incentives. During this session, PointClickCare will discuss:

- The CCHIT and what the EHR certification program is
- How the CCHIT EHR certification program affects long term care providers
- The meaningful use criteria required for federal funding of EHR technology projects
- How the CCHIT requirements affect your vendor and technology decision

*Faculty: Brian Dimit, Product Specialist, Jeff Scheepers, Product Marketing Manager, PointClickCare, Mississauga, Ontario*

## 8H Celebrate Age With DiSC®

With an unprecedented number of people redefining what it means to be "old," long term care could be facing unprecedented change. However, the need for an effective workforce won't change. In this session, participants will complete the DiSC® Personal Preview in order to discover their own personality strengths and celebrate the differences in others. They then will gain insight that will help build a stronger, more cohesive work team. With a more effective interconnected staff, unprecedented changes can turn into unparalleled opportunities.

*Faculty: John Dyer, CPO, Leeson Brown, Ltd., Kenton*

*\*Special thanks to Ziegler Capital Markets for sponsoring this session.*



THURSDAY, SEPTEMBER 8

2-3 p.m.

Education Sessions

## 9A Community-based Service Coordination: Connecting Services, Emergency Response, and Aging in Place

Learn about a public/private partnership that offers replicable innovative approaches to the efficient use of social service and health care resources while supporting quality of life and aging in place. InCare, an affiliate of National Church Residences, has partnered with the City of Upper Arlington and the City of Chillicothe and their Fire Divisions to create Service Coordination programs designed to link community members with resources and services to facilitate keeping older adults and residents with disabilities safely in their homes. These programs are believed to be the firsts of their kind. Winner of 2010 AOPHA Home & Community Based Service Award.

*Faculty: Daniel Fagan, Vice President of Support Services, National Church Residences, Columbus; Sandra Buty, Administrative Associate, Linda Mauger, Program Director, Office of Geriatrics and Gerontology, The Ohio State University, Columbus*

## 10B Person-centered Care Plans: Making Them Work for the Resident

The concept of person-centered care is no longer new to us. We know what is expected. But delivering on the promise can often be challenging particularly when carrying out resident care plans. This is an especially difficult task for the direct care staff. The program focuses on the development and implementation of person-centered care plans that reflect both the personal preferences and the medical needs of the resident. The audience will learn the critical elements necessary for capturing the resident's wishes in every phase of care, how to document them into a plan of care and unique ways for actually providing services respectful of those individual choices in an efficient, productive manner.

*Faculty: Johanna Donovan, Director, Clinical Education, Skilled Care Pharmacy, Mason*



### **11C Managing the Cause and Effect of Balance Sheet Risk**

Too few organizations consider their debt commitments when changing their portfolio structures or considering selling assets. Presented by an investment advisor and an investment banker, this session provides a unique both-sides-of-the-balance-sheet approach to reviewing investment decisions. This presentation discusses covenants as elements that can help establish the appropriate risk tolerance for an organization. It reviews the credit profiles' relationship to covenants and the potential impact of violating a covenant. The presentation also discusses investment strategies to help organizations mitigate portfolio volatility that may result in covenant violation.

*Faculty: Kass Matt, Senior Vice President, Katie Morris, Sales & Research Assistant, Lancaster Pollard, Columbus; William Courson, President, Lancaster Pollard Investment Advisory Group, Columbus*

### **12D Destiny, Character and Calling: Regaining Our Passion and Using it to Inspire Others**

In this workshop based on Dr. Lance Secretan's latest ground breaking book, *The Spark, the Flame, and the Torch: Inspire Self. Inspire Others. Inspire the World*, he will guide you in practical ideas, exercises and processes and engage in invigorating conversations with participants. This will be a challenging, dynamic and very practical workshop in which new ideas will be explained and demonstrated, leading to a greater awareness of self, others and the role of leadership in changing self, others and the world.

*Faculty: Lance Secretan, President and Founder, The Secretan Center Inc., Ontario, Canada*

### **13E Behavior Boot Camp: Brainstorming Solutions for Challenging Behaviors in Dementia**

This session will focus on understanding and setting up intervention plans for common challenging behaviors associated with dementia. Participants will learn a model to brainstorm possible reasons for behavior and how to pinpoint creative solutions to reduce common caregiver stressors, such as repetitive question asking, wandering and reduced intake.

*Faculty: Megan Malone, Speech Language Pathologist, Gentiva Health Services, Macedonia*

### **14F Cracking the New Normal by Involving Consumers in Decision Making**

Seniors now have different expectations and visions for retirement, new financial realities and specific needs. Communities are trying hard to understand this changing consumer and what it now takes to convert leads into new residents: a different value proposition, more time and effort to generate sales and incite move-ins. To address the issue,

Brooks Adams Research is conducting a nationwide study focusing on how virtual consumer research communities provide a forum for which marketers can understand what motivates their consumer-base. Our research will identify best-in-class virtual consumer research communities and how these platforms are facilitating research efforts to uncover consumers' unique decision-drivers.

*Faculty: Rob Adams, Partner, Connie Mattox, CEO, Brooks Adams Research, Richmond, VA*

### **15G Storms on the Horizon**

Changes in marketplace demands, Medicare and Medicaid reimbursement, and demographics are creating both challenges and opportunities. Even with the growth of seniors over 85, there is a major movement from nursing care to community-based care models which will create declining occupancy and increased acuity. The need for market re-positioning, flexible facility design and replacement streams of revenue will drive strategic planning for years to come. The panel will share examples of flexible facility design approaches that enable organizations to adapt quickly to changing markets, replacement revenue strategies and case studies on successful re-positioning in Oregon, which implemented a Medicaid waiver program and has reduced nursing home census by 53% and currently provide 81% of all long term care in community-based care settings.

*Faculty: Chris Joos, Partner, Plante & Moran, PLLC, Columbus; Craig Kimmel, Partner RLPS Architects, Lancaster, PA; Patrick McCormick, Partner, Plante & Moran, PLLC, Cleveland; Dennis Russell, Consulting Associate, MHS Alliance, Goshen, IN*

### **16H Stress-less: Effectively Cope with Negative and Challenging Behaviors**

They are everywhere—negative, challenging behaviors that threaten workplace harmony and productivity. Why these challenging behaviors can even be within us! So what can you do to be proactive in our approach and not get caught feeling defensive, frustrated and upset? Learn how to command knee-jerk reactions by identifying behaviors that bug you to better command your reactions. Become more confident in managing negotiator types and learn coping strategies to lessen stress. Explore preventative measures and take away a guided questionnaire to help you strategize the chronic challengers in your life-work.

*Faculty: Lauren Burnett, Principal, Center for Inner Quality, Cleveland*



THURSDAY, SEPTEMBER 8  
3:15-4:15 p.m.  
Education Sessions

### **17A Redesigning Dementia Care**

Through interdisciplinary collaboration and strategic planning initiatives, the dementia program and unit of the Montefiore home was redesigned to improve staff and family satisfaction, reduce negative patient outcomes such as falls and agitation, and provide a deinstitutionalized environment using the existing space. The presentation will take the audience through the beginning stages of planning through completion of the project, using research and outcome measurement.

*Faculty: Regina Prosser, VP of Clinical Services, Montefiore, Beachwood*

### **18B Beginning the Change to Person Directed Care**

Our session will give the attendees the building blocks of how we began culture change. We will discuss why we began our journey, how we got residents involved, how we got staff excited to be involved in PDC. We will discuss consistent assignments, bathing without battle, changes in dining services, nursing practices, life enrichment practices and creating a home like feel to our residents. Our philosophy is to “Honor each Resident”. We will discuss how we practice “Shared Leadership” and the challenges we have had with it.

*Faculty: Kelli Fritz, Director of Dining Services, Erin Henry, Director of Memory Care, Green Hills Retirement Community, West Liberty*

### **19C Opportunities and Challenges in Financing Long-term Care Facilities**

The financial market meltdown coupled with the possibility of reduced reimbursement in the future continue to affect practically every nursing home owned or operated by a non-profit organization that has or is looking for third-party financing, whether conventional or non-conventional, and involving refinancing, construction, acquisition or working capital. This session will provide a timely overview of the issues with today’s financing markets; the financing options that are and are not available to non-profit providers; and action steps that non-profit providers can and should take to help avoid any potential financing problems. Non-profit nursing home owners and operators must be pro-active in these challenging times, and this program will provide assistance in identifying and addressing potential issues.

*Faculty: Richard Fiktus, Attorney-Partner, Lynn Hoose, Legal Assistant, Paul Lang, Attorney-Partner, Rolf Goffman Martin & Lang, Cleveland*

### **20D The Medicaid & Medicare Funding Challenge**

New times ... same old story. Funding shortfalls, belt tightening and other challenges. An update on current Medicare and Medicaid issues.

*Faculty: Bill Kutschbach, Principal and Director, HW Healthcare Advisors, Liz Siegenthaler, Executive Assistant, Howard, Wershbaile & Co., Westerville*

### **21E Preparing for Future Technology-enabled Care Models: A Provider’s Case Study**

Aging services are changing in response to many drivers, including consumer preferences/demands, reimbursement/payment/revenue streams, workforce and technology. Health Reform is accelerating such transformation, and technology will play an important role in future business models. In this context, CAST embarked on a scenario planning exercise to develop a vision for the future of long-term services and supports. The scenario planning process was designed to understand the characteristics of future operating environment, delineate potentially viable business models and identify enabling technologies. Learn from a case study describing one provider’s journey in exploring and implementing some of these technologies and business model components and discuss the lessons learned.

*Faculty: Majd Alwan, VP, Center for Aging Services Technologies (CAST), Washington, D.C.; David Gehm, President and CEO, Lutheran Homes of Michigan, Frankenmuth, MI*

*\*Special thanks to Ziegler Capital Markets for sponsoring this session.*

### **22F Ask Event: Sharing Best Practices in Philanthropy**

In this session, representatives from St. Francis Senior Ministries will share their fundraising strategy of successful ask events held at their campus. They will discuss the process and guidelines they used to ask significant donors to make a financial commitment to their organization. The ask event involved the use of table captains and strictly followed a program that respectfully moved donors in and out of the event within an hour. This simple ask event exceeded the goals of this organization and can for you too.

*Faculty: Robert Hauzie, President/CEO, Rhonda Wolpert, Director of Development, St. Francis Senior Ministries, Inc., Tiffin; Shayna Fabrizio, Physical Therapist, FabRehab, Tiffin*

### **23G Public Policy Panel**

Get expert insight with up-to-date information on state changes in senior service policy as well as other legislative initiatives.

*Faculty: Speakers TBA*

## **24H The Obama Board-Yes We Can (And We Are)!**

The National Labor Relations Board (NLRB) governs the employment relationship between care-giving institutions and employees. The Board is actively conducting business issuing employee and union-friendly decisions. Understanding the impact of these decisions on day-to-day employee relations and longer term employment strategies is critical, particularly in the current environment of aggressive union organizing in the health care field. This session outlines and explains the important NLRB decisions and the steps employers must take to maintain lawful compliance with the National Labor Relations Act.

*Faculty: Donald Keller, Partner, Kim Moore, Legal Assistant, Bricker & Eckler LLP, Columbus*

## **25H Keep your Population Engaged and Connected through Volunteer Programs**

Our lives are greatly enriched by the contact and connections we make with others. We can share stories, joys and smiles. At Cedar Village, a wonderful group of our residents are actively providing service through volunteering. Taking place both inside our facilities and outside the walls of our organization, our volunteers maintain active roles in our community. Everyone needs meaningful work, and to love what you do and feel that it matters – how could anything be more rewarding? Cedar Village resident volunteers play an active role in day to day functions.

*Faculty: Carol Silver Elliott, CEO and President, Angie Tapogna, Director of Marketing and Volunteers, Cedar Village Retirement Community, Mason*



THURSDAY, SEPTEMBER 8

4:30-5:30 p.m.

Education Sessions

## **26A Council for Life Long Engagement: Working to End Ageism**

The Council for Life Long Engagement (CLLE) seeks to encourage and enable elders to share their knowledge and talents with school children to reverse any negative aspects of ageism. Studies on ageism indicate that negative stereotypes actually reduce the longevity of elders by 7.5 years. The Council for Life Long Engagement partners with schools to match elders' experiences and talents with the school curriculum. Elders teach various subjects in the classroom. Children will change their mind set about the purpose and value of elders by creating positive and rewarding relationships over time. Using our replicable model other retirement communities and schools across the country will help elders by eliminating ageism in this and future generations.

*Faculty: Dr. Corning Benton, Resident, Marjorie P. Lee Retirement Community, Cincinnati, Laura Lamb, Vice President, Residential Housing and Healthcare,*

*Episcopal Retirement Homes, Inc., Cincinnati, Kathy Oney, Administrative Assistant, Deupree House, Cincinnati*

## **27A Technology-assisted Cluster Care Model**

This presentation will give providers a detailed overview of how to build or enhance their current community service models providing seniors with a safer smarter environment in which to age in-place. The presentation will provide participants with a general overview of various in-home wireless technologies and their current capabilities. The session will also outline strategies on how to overcome financial and operational barriers of adopting and implementing these new care models.

*Faculty: Jim Reilly, Director, NewCourtland, Philadelphia, PA*

## **28B Person Centered Care: It Takes a Village**

Person Centered Care is an opportunity for everyone to make a difference in the lives of the residents we serve. From family and friends to caregivers and decision makers, we all can enrich and enhance the lives of the important people we serve by making a commitment to be resident focused and purpose committed. This session will cover how each can benefit the lives of our customers and how we can each put into practice a person centered mission at our communities.

*Faculty: Matt Dapore, Administrator/President, Ohio Person-Centered Care Coalition, Westerville*

## **29C Form 990: Lessons Learned and Challenges Ahead**

Now that all organizations have completed at least one year of the new Form 990, this session will look back at the difficult compliance areas, including the disclosures about officers' compensation and governance issues, with the intent of improving your tax return. We will also cover new IRS interpretations of various questions and the challenge of completing all of Schedule K for tax-exempt bonds. Session description: We will conduct an in-depth review of compensation disclosures for Part VII and Schedule J including benefit questions of Part I of Schedule J. We will also focus on governance policies and proper disclosures related to those questions. Additionally, the requirement to complete all 4 parts of Schedule K for an institution's tax-exempt bonds will be especially challenging. We will examine bond proceeds reporting issues, private business use of bond-financed facilities, and arbitrage. Finally, we will explore tips to make your Form 990 an effective public relations document.

*Faculty: Christopher Anderson, Shareholder, Michael Mullee, Shareholder, Maloney + Novotny, LLC, Cleveland*

### **30D Transforming your Community: The New Way to Increase Occupancy**

Many retirement communities are experiencing a dramatic decrease in occupancy levels due to the state of the economy. This session will educate participants on how implementing a transformation strategy can increase occupancy and improve the marketability of the community by positioning your community as a lifestyle destination.

*Faculty: Andre Alexandre, Director of Business Development, Morrison Senior Living - Bloomfield Hills, MI; Gene Dolloff, Chairman, Kevin Svagdis, President, Morrison Senior Living, Atlanta, GA*

### **31E Home Health, Hospice and Community-based Services Update**

Provide industry updates for Home Health, Hospice and other community based services specifically as it relates to healthcare reform and the Kasich administration.

*Faculty: Jamie Dixon, CPA, Consulting Manager, Chris Joos, Partner, Plante & Moran, PLLC, Columbus*

### **32F Online Marketing: Keeping Pace with the 21st Century Consumer**

This session will enhance the experience of online marketing for CCRC and senior housing management. The latest techniques to improve results will be discussed. Older adults and Baby Boomers have grown web savvy in their Internet search for retirement facilities. This educational seminar on online marketing will help CCRC senior management keep pace on how search engines like Google determine results. Proven techniques will enhance attendees' online results through concepts like keywords and SEO. Other topics include interpreting online metrics, quantifying results, creating content and links to senior housing websites, generating leads and bolstering lead generation through search engine positioning.

*Faculty: Adam Fineman, Managing Director, Stephen Winbaum, Communications Coordinator, RetirementHomes.com, Toronto, Ontario*

### **33G Life after Reimbursement Cuts: Dealing with your Banker, Vendors and Constituents**

Impending reimbursement cuts will affect every aspect of our mission, operations and relationships. Preparing now will preserve those relationships. Lenders, vendors, staff, referral sources, contributors and board members each have a different concern, all of which will focus on the effect of the vaunted cuts, and each has a different concern and need. Accordingly, the response to each must be tailored to those needs and concerns. Identifying those and responding to them is both an art and a science.

*Faculty: Rebecca Bair, Administrative Assistant, Harry M.*

*Brown, Chair, Health Care Group, Benesch Friedlander Coplan and Aronoff LLP, Cleveland*

### **34H Next Generation Employee Wellness Programs**

Health Care Reform has not bent the medical cost curve, as medical inflation will average at least 6% annually over the coming decade. Health care premium increases can be managed one of three ways: employers absorb more cost, employees absorb more cost, or both collaborate to effectively modify the quantity of medical goods and services required by an employee population. This presentation describes the necessary components of "next generation" wellness programs: effective incentive structures, participation rates, "continuous" health behavior and measures monitoring, and objectively measured ROIs. Several illustrative case studies are presented.

*Faculty: Paul Kolodzik, MD, MBA, President, Wellness Strategies & Solutions, Bellbrook*



FRIDAY, SEPTEMBER 9

8-9:30 a.m.

Education Sessions

### **35A Reducing Hospital Re-admissions**

As the American population ages, the incidence of CHF will increase dramatically over the next 10 years as the baby boomers enter retirement. With the impact of CHF hospital re-admission issues, it will be imperative for long term care facilities, area hospitals and their partners to minimize re-admissions and to create better resident outcomes through physician, physician extenders, staff, resident and family education.

*Faculty: Arman Askari, MD – Cardiology, Premier Health Advocates, Orange; Julie McCostlin, Director of Marketing, Keith Marchand, President, Source Diagnostics, LLC, Solon*

### **36B Coaching Approach to Communication**

One of the most exciting aspects of life in a household is the array of choices that the household have on a daily basis. Some of our decisions are simple, like deciding what the household would like to eat for dinner or what opportunities of engagement we would like to participate in. However, when the households are confronted with problems, it can be very difficult to decide on the best option, and we may be plagued by indecision. We may waver back and forth between different perspectives from members in the household and may feel paralyzed to solve the problem. However, if we can apply very simple problem solving and communication techniques that actively engage the household members, we can help minimize the frustration when the household does not come to consensus.

*Faculty: Denise Gannon, VP of Wellness and Performance Improvement, Eliza Jennings Senior Care Network, Lakewood*

### **37C Learning to Live with Lower Reimbursement: Maintaining your Profit Margin through Operations Improvement**

Over two thirds of all states project significant budget shortfalls this year and next. Medicaid payments for such states are likely to be reduced to help balance budget deficits. ParenteBeard will present financial statistics of nursing home providers from states whose Medicaid reimbursement falls in the lowest quartile. How do providers in such states meet their obligations to the residents they serve? What is the cost of direct care staff, per diem costs and average age of plant? What is the payor mix? Discuss how Ohio providers can apply the operating strategies of providers in these states to their operations.

*Faculty: David Gottshall, Senior Consultant - Senior Living Services, ParenteBeard LLC, Mechanicsburg, PA; Wendy Price Kiser, Director, Senior Living Consulting Services, ParenteBeard LLC, Waterville; Pamela Richmond, Vice President of Strategic Planning and New Ministry Development, Otterbein Homes, Sylvania*

### **38D Celebrate Age with the Right People on the Board Bus**

In these challenging economic times, board members of not-for-profit senior care facilities have to work harder than ever and have more complex duties than in the past. As such, it is possible that the premise of receiving compensation may make its way to the front and center of future board discussions. Review the historic reasoning for not compensating board members and explore thought-provoking ideas to consider when evaluating whether or not you should implement board compensation. We will also address potential regulatory, mission and community related conflicts for doing so.

*Faculty: Amy Hayman, Managing Director, Cain Brothers & Company, LLC, Chicago, IL*

### **39E Legal, Survey and Enforcement Update**

This session will provide information regarding the latest trends in survey and enforcement. With the multiple changes in the interpretive guidelines, providers are finding themselves lost in the maze. Understanding the ramifications of regulatory actions help providers be more proactive in their facilities. Recent HIPAA changes require providers to make modifications in their daily practices regarding protection of health information.

*Faculty: Janet Feldkamp, Attorney, Benesch Friedlander Coplan & Aronoff LLP, Columbus*

### **40F Through Their Fingertips: Using the Web Beyond Your Website**

We are currently seeing a trend in the use of social media and online marketing tactics by all ages and many businesses. In 2010, Love & Company researched further into how the

senior audience is using online networks such as social media, exploring how communities can embrace these new trends and leverage them in their marketing efforts. Through web based surveying of age- and income-qualified homeowners, wait list and lead base members, and also current CCRC residents Love & Company explored:

- How many seniors are currently using various social media networks, viral marketing and other Internet communication methods
- Which networks and programs are seniors using and how
- Would residents be willing to assist communities with their marketing efforts using these methods

In addition to the surveying, Love & Company conducted training at multiple community locations on:

- Setting up accounts and teaching residents how to use social media networks such as Facebook or Twitter
- Teaching residents how to participate in blog sites and discussion boards
- Forwarding email invitations received from sales team members, encouraging residents to invite friends on campus for events

Upon completion of these sessions, we carefully monitored and analyzed the use of these networks on a monthly basis. In this interactive seminar, participants will have the opportunity to learn best practices for participating in online networks and allocating budgets and resources for these tactics.

*Faculty: Emily Harman, Media Manager, Jessica Kraft, Senior Account Manager, Kimberly Paddison Herr, Senior Marketing Specialist, Love & Company, Inc., Frederick, MD*

### **41G Residential Care Updates**

Review the latest trends impacting assisted living providers. Explore emerging trends in aging services. Learn from best practices and idea sharing with your peers.

*Faculty: Fran Savard, Director of Regulatory Relations, LeadingAge Ohio, Columbus*

### **42H Effective Strategies and Proper Documentation for Treating Residents with Dementia**

This presentation is great for anyone working in a long term care setting with residents who have dementia or any other cognitive impairment. Attendees will learn about different communication / cognitive problems associated with dementia, why communication fails, how to best approach, handle and communicate with a resident with dementia, how to respond when something goes wrong, or the resident becomes agitated or combative. This presentation also explains the need for skilled intervention and therapy for this special population, how to properly document for that care to ensure reimbursement, while decreasing denials.

*Faculty: Thomas Conrad, Clinical Specialist Cognition, Behavioral Approaches, Therapy Partners, Middleburg Heights*



FRIDAY, SEPTEMBER 9  
10-11:30 a.m.  
Education Sessions

**43A Preventing Medication Diversion: How Collaboration Led To Best Practices**

Learn from our experience as we collaborated with the Ohio State Board of Pharmacy and our facility pharmacist to prevent medication diversion. The Board of Pharmacy will discuss medication diversion trends, what they monitor for, and how they can assist facilities. The facility pharmacist will discuss how they also play a role in monitoring for medication diversion and what your facility should expect. We will share with the participants our experience with working with the Board of Pharmacy, how our pharmacist assisted our facility, what systems were effective, what we changed, and how this collaboration led to a successful implementation of best practices.

*Faculty: Bonnie Allen, Director, Stephanie DeWees, Administrator, Green Hills Retirement Community, West Liberty; James Amend, Specialist, Ohio State Board of Pharmacy, Columbus*



**44A Using a Holistic, Web-based Assessment Tool to Improve Healthy Aging Outcomes for Community Dwelling and Life Care Community Older Adults**

This session will look at a national consortium of non-profit aging service organizations, including life care communities, moderate and subsidized housing, and “at home” and home care agencies using a holistic, evidence-based assessment tool to understand and catalogue health and wellness indices, and improve healthy aging outcomes of their independent residents. The panelists will showcase how they are using data to improve their ability to: a) help older adults to remain independent and age in community; b) identify and manage risk more successfully; c) improve the quality and continuity of health services; and, c) target optimum healthy aging programs, services, and interventions.

*Faculty: Neil Beresin, National Program Manager, COLLAGE, The Art & Science of Healthy Aging, Kennett Square, PA; Joan Krueger, Director, Longwood at Home, Presbyterian SeniorCare, Oakmont, PA; Terri Lanham, Health*

*and Wellness Clinic Nurse, Kendal at Oberlin, Oberlin; David Zientarski, Director of Care Coordination, Kendal at Home, Westlake; Doug Zimmer, Director/Co-owner, Center for Information Management (CIM), Ann Arbor, MI*

**45B Integrating Technology Into your Culture Change Journey**

The world of culture change and the world of technology are usually not brought up in the same sentence. This unique presentation, geared towards non-technical individuals, will demonstrate how technology can seamlessly fit into an organizations culture change journey. Through adaptive computerworkstations and a rich source of information content, the computer can become an integral part of a community’s programming for meaningful resident involvement and staff communication. Case studies and research will demonstrate the benefits of technology to staff, families and residents of communities as it affects every aspect of their programming in their culture change journey.

*Faculty: Sheryl Kay, Inside Sales Manager, Jack York, Co-Founder/President, It's Never 2 Late, Centennial, CO; Belinda Shaw, Clinical Analyst, Ohio Presbyterian Retirement Services, Columbus*

**46C Regulatory Billing Compliance for CFOs, CEOs and Administrators**

Clinical compliance is key for all LTC providers. However, billing compliance is just as crucial. With the impending RACs (Recovery Audit Contractors), Medicaid Integrity Audits, OIG Workplan, ZPICs, etc, the financial functions of the SNF Business Office are under increasing scrutiny. This session will address the current billing compliance programs and offer a strategy for development of a compliance program that interfaces with the overall quality initiatives of the provider.

*Faculty: Carolyn Lookabill, Director of Operations, Jennifer Richter, CPA- President, Richter & Associates, Inc., Beachwood*

**47D Engaging the Board of Trustees in Quality, Risk and Resident Safety**

In order for an aging services organization to be successful, the board of trustees needs to embrace a leadership role in creating a culture based on transparency and accountability. This presentation will provide senior leadership with information and tools to engage the board as partners for improving the quality and safety of resident care.

*Faculty: Nancy Sulzberger, Risk Control Consultant, Ellen Wodika, Risk Control Consulting Director, CNA HealthPro, Chicago, IL*

## 48E I Am the Leader - What Do I Need to Know About the MDS 3.0?

You are the leader (CEO, Administrator, Director of Nursing, unit manager) – what should you know about the MDS process? How do you manage that process? The accuracy of the MDSs ties directly to care, quality, and cash flow. What do you need to know about timing, completion, and submission of the MDSs? What about efficiency? How do you know if the MDSs are accurate? Are you taking credit for the services provided? What reports do you need routinely? Part of being a leader means a better understanding and "celebrating" what to do with the information generated from the MDS.

*Faculty: Jane Belt, Clinical Group Manager, Plante & Moran, PLLC, Columbus*

## 49E Looking Across the Continuum: What Do Residents Tell Us?

Leaders of organizations which serve elders across the continuum have a unique challenge - to understand and address the needs of each of these groups of elders. This program will present resident and family satisfaction data from the MyInnerView data base which spans the continuum of care. It is essential for a leader in long-term care to remain in touch with the feelings of their residents about the quality of services, quality of care and quality of life they provide. This session will look at the differing priorities of residents across the continuum of care, i.e. Independent Living, Assisted Living, and Skilled Care. Their differing priorities must be understood by leadership and the Board of Directors so they can be integrated into the organization's mission, vision, and strategic planning. Caregivers translate the vision and mission into how they serve and care for the elders. Understanding the needs and wants of caregiving staff, is as important for the leader as is knowing the needs and wants of the residents and their families. Research results will be used to inform leaders of the drivers of employee satisfaction. This session using current data will describe the priorities of long-term care clients and their caregivers.

*Faculty: Mary Tellis-Nayak, VP Quality Initiatives, MyInnerView, Chicago, IL*

## 50F 10 Tips to Maximize the Experience of a Prospect and Encourage Sales

When it comes to marketing your CCRC, first impressions are critical. The environment and experience visitors feel when they walk through your front door, and how they translate into the envisioning process of living within your community, can have great impact on your ability to close a sale. This session will enlighten participants to the mindset and through process of a prospect, from what they see to what it means to them as a future resident. By anticipating what the prospect will think after viewing the community, you can help alleviate common pitfalls of the sales process. We'll explore ways to develop a



"model apartment dream book" to help wow prospects and illustrate for them a vision of their model units. Presenters will provide the audience with the tools to sell both new start-up communities and established communities with aging buildings whose tired interiors have affected their census. Also, presenters will detail how an inexpensive finish scheme and standards program for apartments and cottages can be developed for facility managers in updating each unit as it is vacated, and how simple fixture and finish materials can become unique selling points in your sales meetings.

*Faculty: Tim Bracken, Director of Business Development, Love & Company, Frederick, MD; Christie Richardson, Senior Interior Designer, Barbara Summerford, President, GMK Interiors, Columbia, SC*

## 51G Ohio Regulatory Update

A panel of state agency experts will provide up-to-date information on Ohio's regulatory "hot topics."

*Faculty: Speakers TBA*

## 52H Proven Best Practices Help Prepare for Future Workforce Demands

Best practices and tools from a three-year intervention conducted in three nursing homes called REACH will be shared. REACH included four major components: 1) Hiring the right people 2) Preparing staff for success 3) Sustaining employment and 4) Paving the way to career advancement. Results at the end of the second year demonstrated outcomes such as: reduced employee turnover, increased staff satisfaction with job and supervisor, and an increase in incumbents promoted into open positions and minorities into program and management positions. Implications of the findings to change the practice and culture in nursing homes will be discussed.

*Faculty: Shelley Curtan, REACH Project Manager, Denise Smudla, Director of Human Resources Jennings Center for Older Adults, Garfield Heights; Farida Ejaz, Senior Research Scientist, Margaret Blenkner Research Center of the Benjamin Rose Institute, Cleveland*



FRIDAY, SEPTEMBER 9

3:15-4:45 p.m.

Education Sessions



### **53A Being the Best you can be Costs Nothing**

This session provides the audience with tools and techniques to effectively self-evaluate the condition of their own community then provides a collection of best practices, simple solutions and cost-effectively improves that can be made throughout the facility that will enhance resident and family satisfaction, improve staff moral and increasing property value and bottom-line for the owner. Our team has evaluated over 600 senior living communities across the country and we had seen the good, the bad and the ugly. We have witnessed various “does” and “don’ts” that can if brought to light can raise the level community in short order and for the most part with no extra staff, dollars or outside help.

*Faculty: Greg Cini, Vice President, Lisa Cini, President, Linda Gabel, Director of Design, Mosaic Design Studio, Columbus*

### **54A Changing Resistance and Refusals into Positive Interactions and Better Outcomes for All Involved**

This session is designed to help care partners better understand why difficult or resistive behaviors occur, making care assistance problematic or even impossible to deliver. First, we will reconsider our understanding of commonly occurring ‘resistance.’ Next we will look for other factors that contribute to resistance or refusal, such as: life-long personality traits, life experiences, and preferences, environmental conditions and cues, other health conditions, the structure and flow of the day and caregiver skills and approaches will be discussed and demonstrated. Finally, an effective problem solving strategy to reduce the intensity, frequency, or occurrence of resistance and refusals will be provided.

*Faculty: Teepa Snow, MS, OTR/L, FAOTA, Positive Approach, LLC, Efland, NC*

*\*Special thanks to CompManagement, Inc. for sponsoring this session as well as the conference bags.*

### **55B Dining-It's what Makes a Home**

There is lots of talk about changing the culture of long term care and the dining experience always come to mind. This session will look at practical, common sense, economical ways to create a dining experience that returns rewards to residents, families and staff. An experience that can reduce falls, increase retention, reduce expenditures on supplements, assist in weight management programs, increase satisfaction AND increase census!! Sounds like a magic potion? It is! Plan to attend to learn inexpensive, supportable and easy to explain approaches focused on "making it home" for all.

*Faculty: Bob Cameron, Administrator, Crandall Medical Center, Sebring; Kay Lakhi, President, Dietary Solutions, Lewis Center; Emerson Stambaugh, Administrator, Deupree Cottages, Cincinnati*

### **56C Maximizing Therapy's Role in Reimbursement**

This course will assist participants to explore new tools, operational practices, and innovative ideas to expand the current role of therapy in skilled nursing facilities. Rehab continues to be a revenue generating service. The course will provide an overview of the timeliest and most critical therapy issues to assure that rehab remains a primary revenue generator for SNF operators.

*Faculty: Kim Saylor, Vice President Business Development, Concept Rehab, Inc., Toledo*

### **57D Governance – Best Practices in Board Leadership**

Many not-for-profit organizations experience a lack of volunteer involvement and/or understanding of board members’ roles as volunteer leaders of the organization. This session will review data from CCRC’s and retirement communities from across the country on best practices in board leadership. The speaker will utilize a PowerPoint presentation with small group interaction and a time for questions/answers and comments, as well as historical facts, anecdotal illustrations, and comments from the attendees to develop points of emphasis.

*Faculty: Thomas Mesaros, President & CEO, The Alford Group, Seattle, WA*

### **58E Utility Data Management and Retrofits**

The presentation will highlight the methods NCR uses to manage utility data at our facilities heavily occupied by low-income seniors and people with disabilities and will also highlight some basic retrofits that NCR has done to increase energy efficiency and conservation at its properties. Specifically, the presentation will show the ways which NCR identifies “poor performers” from an energy standpoint using benchmarking and data management services, and what the organization does to curb those performers such as retrofitting lighting and water equipment and upgrading other aspects contributing to poor energy efficiency.

*Faculty: Steve Bodkin, Vice President of Engineering, Energy, & Procurement Services, National Church Residences, Columbus*





### **59F Mind the Gap: Find and Fix Gaps in your Sales Process**

Most communities have gaps lurking in the sales process that are hidden from obvious view. These gaps can be identified and corrected so communities' marketing teams can become more productive and reach sales objectives in a timelier manner. This session will instruct participants how to identify and prevent gaps through three key areas: a marketing plan that manages productivity, a waiting list that proactively manages prospects, and a communications plan that smoothes internal conflict so all team members communicate the same message to external stakeholders. The marketing plan is the starting point for managing and preventing process gaps. Without measurable and achievable sales goals, the marketing team could lack motivation and efficiency. Efficiency is heightened and streamlined through the use of sales tools that add structure to the process and maintain a consistency in output. As an external element of the sales process, mystery shoppers can identify process gaps and also help internal teams monitor their own behaviors. Teams can increase awareness of their own activities and processes and can monitor those processes internally through the judicious use of mystery shoppers. The implementation of a community's waiting list can either incite or deter sales, depending on how the marketing staff navigates it. When waiting list become burdensome, it is time to look at alternative ways to manage the list and increase the prospective resident's sense of urgency. Session attendees will learn how to accelerate the sales process through effective implementation and management of the waiting list. Some degree of competition is good, but when internal conflicts threaten and distract from the sales goals, it is time to implement changes. One method to manage the conflict and get all the team members focused on the same goal is through improvements in internal communications. This session will provide actionable steps to help team members improve their communication with each other, within the communities they serve, and with their prospects.

*Faculty: Joy Evans, Regional Director of Marketing, Michele Weikert, Executive Assistant/Marketing Manager, The Asbury*

*Group Marketing, Germantown, MD; Cathy Ritter, Vice President of Marketing, Asbury Communities, Germantown, MD*

### **60G Let's Make It Personal**

Have advance directives failed us? Learn what the problems are in nursing homes regarding documents. Participants will have the vignette of Terri Schiavo presented in a dramatic fashion as a way to start the ACP conversations with family members. Innovative ways will be given as to how to emotionally impact clients to talk to their families. Characteristics will be identified as to what to avoid when selecting a healthcare decision maker. Factors will be identified that impact behavioral change. An explanation and update on the MOLST will be presented.

*Faculty: Lisa Newburger, LISW-S., Health and Wellness Educator, Discuss Directives, LLC, Solon*

### **61H Chemical Restraint Reduction: How to Modify the Environment to Manage the Behavior Instead of Medicating the Behavior to Fit in the Environment**

This presentation is great for anyone working in a long term setting working with a cognitive impairment. Attendees will learn about different non medication strategies for behavior management, communication strategies, why communication fails. How to best approach, handle, and respond when something goes wrong, or the resident becomes agitated or combative. This presentation also explains the need for skilled intervention, and therapy for this special population, List strategies to properly documenting that care to ensure reimbursement, and to decrease the denials.

*Faculty: Thomas Conrad, Clinical Specialist in Behavioral Approaches, Therapy Partners, Middleburg Heights*



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# CAIN BROTHERS

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## CONFERENCE SITE AND HOTEL INFORMATION

Hyatt Regency Columbus | 350 North High Street | Columbus, OH 43215

Phone: 1-800-233-1234 | [www.columbusregency.hyatt.com](http://www.columbusregency.hyatt.com)

Make your reservations online at <https://resweb.passkey.com/go/LeadingAgeOhio>.

Be sure to make reservations by **August 18** to take advantage of the rates listed at right; mention LeadingAge Ohio to receive the conference rate. Reservation requests received after the cut-off date will be accepted as space and rate availability permits.

### ROOM RATES

Single Occupancy	\$136
Double Occupancy	\$146
Triple Occupancy	\$156
Quadruple Occupancy	\$166
	.....

*Suite rates available by request through the Hyatt Regency.*

For additional hotel information, map and driving directions, please visit [www.columbusregency.hyatt.com](http://www.columbusregency.hyatt.com).

## How to Register

Choose one of these four easy methods to register for LeadingAge Ohio's Annual Conference and Trade Show:

- **Online** at [www.LeadinAgeOhio.org](http://www.LeadinAgeOhio.org); "Division News," "Member Services"; click on "Education & Events" and view the related conference links or see the September calendar for this event.
- **Scan** and send your completed registration form to: Corey Markham at [cmarkham@leadingageohio.org](mailto:cmarkham@leadingageohio.org). We encourage payment via credit card for scanned registrations. If you prefer to pay by check, please mail your payment promptly with copy of the scanned registration form to the address below.
- **Fax** your completed registration form (see insert) to: LeadingAge Ohio, Attention: Annual Conference, (614) 444-2974. We encourage payment via credit card for faxed registrations. If you prefer to pay by check, please mail your payment promptly with a copy of the faxed registration form to the address below.
- **Mail** your completed registration form (see insert) with payment to: LeadingAge Ohio, Attention: Annual Conference, 855 South Wall Street, Columbus, OH 43206-1921.

Your reservation will be made upon receipt of your registration form and payment by credit card or check. **All organizations will receive a confirmation. If you do not receive this confirmation, please do not assume that you are registered.**

Once you have registered for the conference, please secure your hotel reservations. See above for hotel information.

### Early Registration Discount – Through August 5

Register by August 5 (scanned, faxed or post marked by August 5) and receive a discount on the registration fees. After August 5 through August 24 you must register at the full registration fees. All registrations and payments must be received by August 24. **If you are unable to register by August 24, you must register on site.** Please refer to page 4 for registration hours.

### Registration Changes

Please submit registration changes in writing by August 24 to: LeadingAge Ohio, 855 South Wall Street, Columbus, OH, 43206-1921, by e-mail to [cmarkham@leadingageohio.org](mailto:cmarkham@leadingageohio.org) or by fax, Attn.: Conference to (614) 444-2974.

### Cancellation Policy

Late/on-site registrations will be assessed a \$60 fee. Cancellations received prior to August 24 will be refunded minus a \$60 processing fee. No refunds will be issued after August 24.

## CONFERENCE RATE DEFINITIONS

**Full Conference Rate:** Includes all education sessions, handouts, up to 12 continuing education units per person, breakfasts, lunches, Exhibitor and Awards Reception, Awards Celebration and breaks for each attendee. Please see chart on the right for registration fees for additional registrants.

**Super Saver Group Rate:** Up to eight (8) people from one facility in one location may register for the Super Saver Group Rate. This rate includes all education sessions, handouts, up to 12 continuing education units per person, breakfasts, lunches, reception and the Awards Celebration and breaks for each attendee. Please see chart on the right for registration fees for additional registrants.

**Daily Rates:** Include all education sessions, handouts, up to 6 continuing education units per person, all meals, special events and breaks on the respective day. Note to September 8 only registrants: To attend the September 8 Exhibitor and Awards Appreciation Reception and Awards Celebration there is an additional charge of \$75 for a ticket.

**Special Rate:** This special full conference rate is available for trustees of member organizations, administrators-in-training, other aging services providers in transition, employees of government agencies and full-time students of accredited universities and colleges. Note: To attend the September 8 Exhibitor and Awards Appreciation Reception and Awards Celebration there is an additional charge of \$75 for a ticket.

**Non-Exhibiting Nonmember Vendor Rate:** This conference rate is available to individual staff of nonmember firms who would like to attend the Annual Conference and Trade Show. Note: To attend the September 8 Exhibitor and Awards Appreciation Reception and Awards Celebration there is an additional charge of \$75 for a ticket.

**Guest/Additional Meals:** Additional meal and reception reservations are available for purchase for family and friends of conference registrants. Lunch reservations for the conference lunches can be secured for \$35 per person (\$55 nonmembers) and \$75 for members (\$125 nonmembers) for the September 8 Exhibitor and Awards Appreciation Reception and Awards Celebration.

Join today and register at member rates!  
Find out more about membership and the related benefits at [www.leadingageohio.org](http://www.leadingageohio.org); click on "Become a Member".

## REGISTRATION FEES

	Member		Nonmember
	Early Registration Discount through 8/5	Full Registration Fee after 8/5	Registration
<b>Individual Full Conference Rates</b>			
Full General Conference	\$395	\$445	\$595
Each additional person from the same campus	\$350	\$395	\$550
Special Rate	\$175	\$175	\$265
Non Exhibiting Nonmember Vendor Rate	\$780	\$830	\$1105
Super Saver Group Rate	\$2350	\$2550	\$3650
Each additional person from the same campus	\$275	\$275	\$415
<b>Daily Rates</b>			
Thursday September 8	\$250	\$275	\$375
Friday September 9	\$175	\$195	\$315
Special Rate	\$95	\$95	\$150
<b>Event/Guest/Additional Meals</b>			
9/7 Sailing on Hoover Reservoir	\$25	\$25	N/A
Each Conference Lunch	\$35	\$35	\$55
Exhibitor and Awards Appreciation Reception and Awards Celebration	\$75	\$75	\$125

### Questions

Questions regarding registration for the Annual Conference and Trade Show should be directed to Corey Markham at (614) 545-9015 or [cmarkham@leadingageohio.org](mailto:cmarkham@leadingageohio.org).

### >>> SPECIAL NOTE <<<

If you require special services or have special dietary concerns, please describe your needs in writing and send via e-mail to Corey Markham at [cmarkham@leadingageohio.org](mailto:cmarkham@leadingageohio.org).

# Thank You to Our Sponsors!

The LeadingAge Ohio Board of Directors, membership and staff extend their sincere appreciation to the Sustaining Firm Sponsors (as of May 31, 2011) for their support of your association and its not-for-profit membership. Their willingness to work with us as part of a team enables us to achieve our mission of improving the quality of life for older Ohioans.

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