

# NATIONAL CONSUMER VOICE FOR QUALITY LONG-TERM CARE 36th Annual Conference & Meeting

I AM AN  
ADVOCATE



the **louder**  
our voice,  
the **stronger**  
our advocacy



**MEDICAID  
CUTS**

**GRAND RAPIDS, MI - OCTOBER 25-28, 2011**



# welcome to the conference

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## Dear Friends:

2011 has been a tremendously important and challenging year for all of us. On a national front, this has been the most critical time for the Consumer Voice since the early 1980s, when the Reagan administration repealed residents' rights and tried to privatize the nursing home survey process. Or since 1995, when we narrowly averted a Medicaid block grant and decimation of the Nursing Home Reform Law. As Congress continues its deficit debate this fall – and the Super Committee works to reach its decision just weeks after this conference ends – on ways to cut \$1.5 trillion from the federal budget, we risk losing all we fought for in the '80s and '90s — and more. In fact, deficit reduction may be the worst policy crisis in the Consumer Voice networks' 36-year history. Without the Consumer Voice fighting for people who need long-term care we could see:

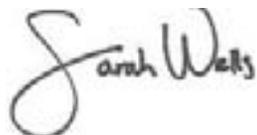
- Growing elderly population impoverished by the cost of long-term care and ineligible for Medicaid — and their families, unable to pay for them;
- Nursing home industry operating with a severely weakened regulatory system and lowered standards;
- State long-term ombudsman programs critically diminished by budget cuts;
- Nursing homes with a smaller, more overworked, worse-compensated and less-trained workforce; and
- Shrinking home and community-based services to allow elders and people with disabilities to live in their own homes — or a system of home and community-based care created as an expedient, low-cost alternative to nursing homes, that is unregulated and unable to meet their users' needs.

This is a scary picture of what we face. However, despite the overwhelming work to be done, our advocacy will make a difference...why? Because the Consumer Voice has a broad-based membership and network of long-term care recipients, families, advocates, researchers, and others...YOU!!!... who inform and mobilize on these important issues. You are making a difference by being at this conference and will make an impact as you help us to advocate.

In response to the work that lies ahead and to build our capacity to make a difference for consumers on a national level, we launched the Action Network. As a member of the Action Network, you will receive breaking news, action steps, newsletters and opportunities to take action regarding national and state policy developments in long-term care. We will give you the tools you need to make your advocacy easier. The Action Network is free and you can join on our website at [www.theconsumervoice.org](http://www.theconsumervoice.org). Spread the word!

On a concluding note, I want to sincerely thank you for participating in the 36th Annual Conference. We know how tight budgets are and recognize the hard work it took for you to attend right now. I hope you learn, network and share here – and that you take away a sense of accomplishment and opportunity as you go back to your home state. We've all faced and overcome major challenges before, and together, we'll do it again!

With appreciation,



Sarah Wells  
Executive Director

# welcome to the conference

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## **Dear Conference Attendees:**

I welcome you to Michigan and to another Consumer Voice Annual Meeting and Conference. Please allow me to start by thanking all those who have worked so hard to make this conference a success. And a special thank you to all of our Conference Friends and Sponsors.

We as advocates have faced a difficult year. Every time we look around we seem to see more suggested changes to Medicare and Medicaid. Now more than ever we need to have a strong voice for the consumers of all long-term care services.

We must continue to let our leaders know that having to use long-term care services is enough of a challenge without the fear of fewer safe guards.

Residents and their families continue to tell us about the lack of quality care they see or receive. Consumers of long-term care services still have problems finding affordable options and services. Advocates still tell us of folks not being able to receive even basic services to ensure human dignity.

Now more than ever we must stand up together for those who need and use long-term services and supports. We continue to hear rumblings of changes and the possibility of fewer resources for long-term services and supports but hear little from those who must have these services to live. We must help their voices be heard.

I ask each of you in attendance to return home with a stronger commitment to ensuring that the voices of residents and consumers are heard by YOUR elected officials.

Please have a good meeting, learn something new, remember something you knew and renew some old acquaintances. And thank you for attending.

Sincerely,



John M. Weir  
Governing Board President

# about us



The National  
**CONSUMER VOICE**  
for Quality Long-Term Care  
formerly NCCNHR

The National Consumer Voice for Quality Long-Term Care, or Consumer Voice for short, was formed as the National Citizens' Coalition for Nursing Home Reform (NCCNHR) in 1975 out of public concern about

substandard care in nursing homes. The Consumer Voice is the outgrowth of work first achieved by advocates working for Ralph Nader and later for the National Gray Panthers. Elma Holder, NCCNHR founder, was working with The Long-Term Care Action Project of the Gray Panthers when she organized a group meeting of advocates from across the country to attend a nursing home industry conference in Washington, DC. At that meeting, representatives of 12 citizen action groups spoke collectively to the industry about the need for serious reform in nursing home conditions. The consumer attendees were inspired to develop a platform of common concerns and motivated to form a new organization to represent the consumer at the national level. Most of the original members had witnessed and endured personal experiences with substandard nursing home conditions.

Today, the Consumer Voice envisions a world in which all consumers of long-term care, services and supports are treated with respect and dignity and have a wide range of affordable, quality options across all settings. These options will make it possible for individuals to receive care and services in the location and manner of their choice and to attain a high quality of life. The Consumer Voice is the leading national voice representing consumers in issues related to long-term care, helping to ensure consumers are empowered to advocate for themselves. We are a primary source of information and tools for consumers, families, caregivers, advocates and ombudsmen to help ensure quality care for the individual.

The Consumer Voice's mission is to represent consumers at the national level for quality long-term care, services and supports. To carry out our mission, we:

- Advocate for public policies that support quality care and quality of life responsive to consumers' needs in all long-term care settings
- Empower and educate consumers and families with the knowledge and tools they need to advocate for themselves
- Train and support individuals and groups that empower and advocate for consumers of long-term care
- Promote the critical role of direct-care workers and best practices in quality-care delivery

The network of Consumer Voice's members and subscribers includes a diverse and caring coalition of citizen action groups, state and local long-term care ombudsmen, legal services programs, religious organizations, professional groups, nursing home employees' unions, concerned providers, national organizations, residents, consumers and a growing number of family and resident councils.

The Consumer Voice provides information and leadership on federal and state regulatory and legislative policy development and models and strategies to improve care and life for all residents and consumers of long-term care services and supports.

[www.theconsumervoice.org](http://www.theconsumervoice.org)

# consumer voice governing board

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In 2010, the Consumer Voice determined major structural changes would be needed to carry out its mission. As a result, the organization developed and implemented a reorganized governance structure based on best practices among similar organizations and the specific needs of the Consumer Voice itself. This reorganization created a new governance structure consisting of a Governing Board and Leadership Council. In addition to its many other advantages, the restructuring provides an excellent opportunity to bring more consumers directly into the Consumer Voice's leadership.

## 2010–2011 Governing Board

The Governing Board is responsible for traditional governance functions, including fiscal oversight and fundraising. To ensure the groups remain aligned, they are linked through joint committees and frequent communication.



**John Weir**  
President



**Norma Harrison Atteberry**  
Immediate Past President



**Lisa Tripp**  
Vice President



**Bill Lamb**  
Treasurer/Secretary



**Afsoon Namini**



**Marilyn Thomas**  
Nursing Home Resident

# consumer voice leadership council

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## 2010–2011 Leadership Council

The Leadership Council is responsible for developing the organization's policy and programmatic agendas.

**Sarah Slocum, Chair**

**Mitzi McFatrach**

**Eric Carlson, Vice Chair**

**Lynn Miller**

**Jeff Crollard**

**Beverley Laubert**

**Sherry Huff Culp**

**Laura Leigh**

**Claire Curry**

**Steve Levin**

**Toby Edelman**

**Julie Pollock**

**Nancy Flowers**

**Drew Strayer**

**Charlene Harrington**

**Elizabeth Wiley**

**Deb Holtz**

# consumer voice staff

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**Sarah F. Wells, MA**, has served as Executive Director of the Consumer Voice since January 2009. In this role, she directs the operations of the organization, leads fundraising and strategic planning efforts, liaises with the Governing Board and represents the Consumer Voice in advocacy efforts for long-term care consumers. Sarah came to the Consumer Voice after nearly a decade at Women In Government (WIG), a national, nonprofit organization providing public policy education for women state legislators, where she served as Vice President. While at WIG, Sarah was instrumental in significantly increasing the organization's operating budget, establishing a public policy department from the ground up, and leading numerous policy initiatives that resulted in significant state action. Sarah received her master's degree in public policy and women's studies from The George Washington University and her bachelor's degree in political science and women's studies from American University. In addition, she holds a certificate in executive nonprofit management from the Center for Social Leadership and has completed additional health policy coursework at The Johns Hopkins University. Sarah has served as an appointed member from the Mason District on the Fairfax County, Virginia Advisory Social Services Board and as a representative to the County's Long-Term Care Coordinating Council. She is a member of the American University Government Relations Alumni Career Committee, National Honorary Committee Member of the Collegiate Cancer Council and is a former Board Member of Community Bridges in Silver Spring, Maryland.

**Robyn Grant, MSW** is the Director of Advocacy & Outreach at the National Consumer Voice for Quality Long-Term Care. In this capacity, she is responsible for growing the Consumer Voice's grassroots network and developing and implementing grassroots advocacy strategies that advance the Consumer Voice's public policy agenda. Prior to joining the Consumer Voice, she served as the Long Term Care Policy Director at United Senior Action, an Indiana senior advocacy organization, and a consultant with the National Long-Term Care Ombudsman Resource Center. She has a master's in social work with a specialization in aging. She was the Indiana State Long-Term Care Ombudsman for eight years and president of the National Association of State Long-Term Care Ombudsman Programs for two terms. Robyn has also served on the Consumer Voice Board of Directors.

**Lori O. Smetanka, JD**, became the Director of the National Long-Term Care Ombudsman Resource Center in June 2004. In her role, she provides support, technical assistance and training for 53 state and more than 600 local long-term care ombudsmen programs. Lori first came to the Consumer Voice in 1993 on a public policy internship. She joined the staff at the Consumer Voice in 1994 as Law and Policy Specialist, focusing on the Nursing Home Reform Act and survey and enforcement issues. From 2002 until June 2004, Lori worked as Information Specialist for the National Long-Term Care Ombudsman Resource Center. Lori has a Juris Doctor from the University of Dayton School of Law.

**Janet Wells**, Director, Public Policy, first joined the Consumer Voice in 1986 as Director of Publications after a 15-year career in civil rights and women's rights advocacy. From 1992 until 2000, Janet was a long-term care specialist with AARP, where she was team leader of the Association's Long-Term Care Team, conceived and coordinated national conferences on long-term care as a women's issue and improving the quality of paraprofessional jobs in long-term care and developed research projects and educational and communications programs on long-term care and health care reform issues. In 2000, she returned to the Consumer Voice as Director of Public Policy to oversee the organization's legislative and regulatory initiatives and special projects to improve the quality of care in nursing homes.

**Jessica Brill Ortiz, MPA**, joined the Consumer Voice in 2006 and currently serves as Program Manager. In this position, Jessica manages grant-funded projects, assists with fund development and provides information, guidance, support and technical assistance related to the continuum of long-term care services and supports on the state and national level to consumers and advocates, including resident councils, family councils and citizen advocacy groups. Jessica holds a Master of Public Administration, a Master of Arts in political science and an advanced certificate in health services management and policy from the Maxwell School of Citizenship and Public Affairs at Syracuse University.

**Amity Overall-Laib, MA**, Manager Long-Term Care Ombudsman Program & Policy, served as a local long-term care ombudsman in Texas for six years advocating for residents in 65 nursing homes and 130 assisted living facilities in a 12-county region. During her tenure in Texas, she led the formation of the Gulf Coast Culture Change Coalition, resulting in two free conferences for long-term care consumers, providers, advocates and regulators promoting Culture Change practices and has presented during local, state and national conferences. She also had the pleasure of representing fellow local ombudsmen on the Board of Directors for NALLTCO (National Association of Local Long Term Care Ombudsmen). Amity was also previously a consultant to NORC. Amity has a master's degree in sociology from the University of Houston.

**Alia Murphy** joined the Consumer Voice in November of 2010 and currently serves as Program and Development Assistant. In her role, she provides administrative, programmatic and fundraising support. In particular, Alia helps to coordinate training opportunities, create and disseminate educational resources, support several fundraising activities such as our biannual appeals, assist with numerous communications efforts and manage office operations. Alia graduated from Georgia Tech in 2009 with a bachelor of science in international affairs with a minor in history.

**Christina Steier** joined the Consumer Voice in 2009 and currently serves as a Project Consultant. In her role, she is responsible for leading the Consumer Voice's database conversion from the current system to a more up-to-date system, creating better ways to communicate with and manage members. She also maintains the Consumer Voice's membership, corresponding with individual and group members as well as providing project support to NORC. Christina is a 2010 graduate from American University with bachelor degrees in musical theatre and sociology.

**Runjit Chandra** joined the Consumer Voice in May 2011 and currently serves as a Project Consultant. In his role, he maintains the Consumer Voice's membership and database system, corresponding with individual and group members. Runjit holds bachelor degrees in theatre and English from The George Washington University and a master's degree in education and curriculum development from George Mason University. He comes to the Consumer Voice after four years of teaching in the Virginia public schools system.

**The Consumer Voice and the Ombudsman Resource Center are also pleased to work with several outstanding individuals and vendors, including:**

**Alejandra Ona**, Bookkeeper/Accountant

**Sara Hunt**, Consultant to NORC

**Ira Hirsh**, RedTongue (Conference Audio/Visual)

**Teddy Spittal**, BigHeadIS (Website)

A special thanks to **Christina Taylor, Jen McNulty and Christina Marmo** of **TaylorMade Experiences** for their event planning services for this conference.

# making it happen: conference sponsors

The Consumer Voice sincerely thanks each of our sponsors for support of the 36th Annual Conference & Meeting. Sponsor support enables the Consumer Voice to keep registration fees affordable and to offer scholarships to those who would otherwise be unable to attend.

Mission Champions • \$5,000+ • Consumer Voice Partners • \$1,000 – \$4,999 • Consumer Voice Friends • \$100 – \$999

## Mission Champions



## Consumer Voice Partners



Michigan  
Campaign  
For  
Quality Care



## Consumer Voice Partners



Elder Law and  
Advocacy Section  
of the  
Michigan State Bar

## CONSUMER VOICE FORMER BOARD MEMBERS

*quality care, no matter where*

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Margaret Farley  
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Diane Menio  
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Cynthia Rudder  
Scott Severns  
Jacquie Woodruff

## Consumer Voice Friends

AAA Association of Michigan

AARP of Michigan

Ah Ha Sisterhood

Assisted Living Consumer Alliance

Direct Care Alliance

Life EMS Ambulance

National Association of Local Long Term Care Ombudsmen  
(NALLTCO)

NCCAP

Walgreens

# conference highlights

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As you review the conference schedule, don't miss these unique opportunities during the 2011 Annual Conference & Meeting.

## You Won't Want to Miss...

### **TUESDAY, OCTOBER 25, 3:45 P.M.**

#### **First-Timers Orientation (Sponsored by NALLTCO)**

First time attending a Consumer Voice conference? Attend the First-Timers Orientation, sponsored by the National Association of Local Long-Term Care Ombudsmen, and learn how to make the most of your first conference experience; tips and highlights included throughout this welcoming "Meet 'n' Greet."

### **TUESDAY, OCTOBER 25, 6:30 P.M.**

#### **Opening Night Reception (Hosted by the Consumer Voice)**

Join us for the opening night reception in the Center Concourse area (conference registration area) of the hotel. The reception will include heavy hors d'oeuvres and a cash bar.

### **WEDNESDAY, OCTOBER 26, 6:00 P.M.**

#### **Social/Networking Dinner and Fundraiser**

Be sure to join us this year for the social event - an evening of food, entertainment and networking with fellow conference attendees. For \$50/person, we will provide a full dinner and entertainment. Salsa lessons will be given at the social, so bring your dancing shoes! A cash bar will be available.

Come support the Consumer Voice and bring your travel companions and colleagues!

### **THURSDAY, OCTOBER 27, 12:15 P.M.**

#### **Residents' Rights Luncheon**

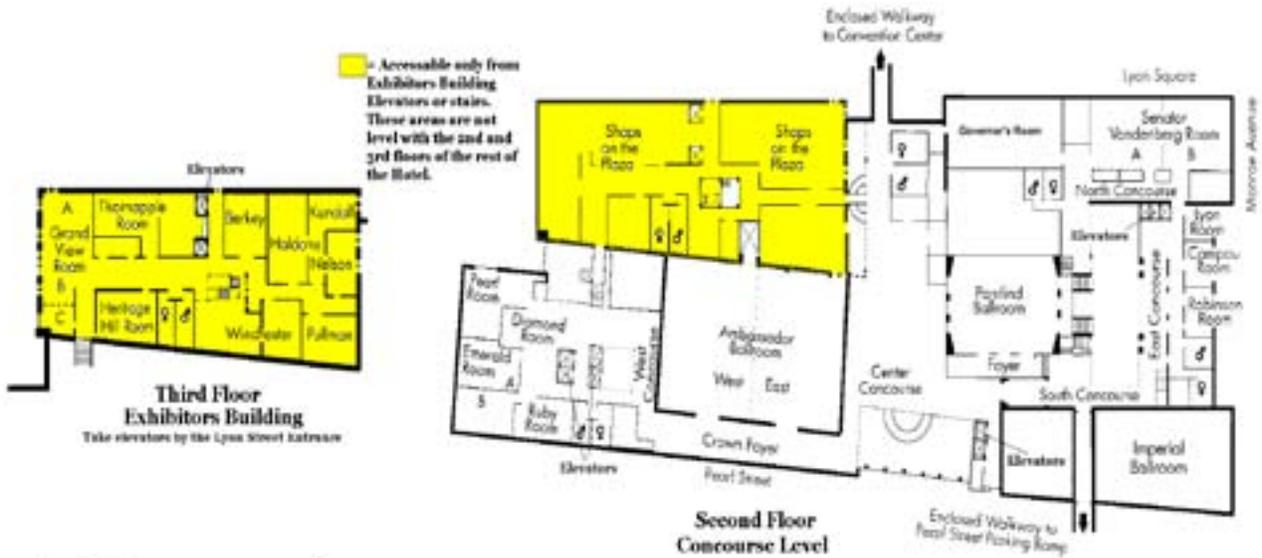
We invite you to a special luncheon for residents and advocates. Your ticket (\$40/person) to this event includes a three-course, sit-down meal and assists supporting residents to join us for free. The luncheon will feature speakers addressing the Residents' Rights Month 2011 theme *Welcome Home: Creating Connections Between Residents and the Community*.

### **FRIDAY, OCTOBER 28, 8:45 A.M.**

#### **Consumer Voice Leadership Awards Ceremony**

Each year, the Consumer Voice recognizes people who have demonstrated an exceptional commitment to improving the lives of long-term care residents. Celebrate your colleagues' accomplishments by attending the Consumer Voice Awards Ceremony!

# hotel information



## Exhibit and meeting space



187 Monroe Avenue NW  
Grand Rapids, MI 49503  
Web: [www.amwaygrand.com](http://www.amwaygrand.com)  
Phone: (616) 774-2000

# schedule at a glance

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## SUNDAY, OCTOBER 23

10:30 a.m. - 12:00 p.m. NASOP Committee Meetings (By Invitation Only)  
12:00 p.m. - 1:00 p.m. Lunch on Your Own  
1:00 p.m. - 5:00 p.m. NASOP Membership Meeting

## MONDAY, OCTOBER 24

8:30 a.m. - 2:30 p.m. New State Long-Term Care Ombudsman Orientation (By Invitation Only)  
3:00 p.m. - 6:00 p.m. Nursing Home Reimbursement Policies Seminar, featuring LTCCC (Free to Attend)

## TUESDAY, OCTOBER 25

7:00 a.m. - 7:00 p.m. Registration Open  
8:00 a.m. - 12:00 p.m. OmbudsManager Users Group Meeting  
8:00 a.m. - 12:00 p.m. Citizen Advocacy Group Meeting (By Invitation Only)  
12:30 p.m. - 3:30 p.m. Pre-Conference Intensives (Additional Fee of \$60 Required)  
3:45 p.m. - 4:30 p.m. First-Timers Orientation (Sponsored by NALLTCO)  
4:30 p.m. - 5:15 p.m. Welcome Remarks  
5:15 p.m. - 6:30 p.m. Opening Plenary  
6:30 p.m. Reception Provided by the Consumer Voice

## WEDNESDAY, OCTOBER 26

7:00 a.m. - 7:00 p.m. Registration Open  
7:00 a.m. - 8:00 a.m. Breakfast provided by the Consumer Voice  
7:00 a.m. - 8:15 a.m. NALLTCO Board Meeting  
8:30 a.m. - 10:00 a.m. Breakout Sessions  
10:00 a.m. - 10:30 a.m. Break  
10:30 a.m. - 12:00 p.m. Plenary Session  
12:15 p.m. - 1:45 p.m. Boxed Lunch (Available for \$15/person)  
12:15 p.m. - 1:45 p.m. NALLTCO Membership Meeting  
2:00 p.m. - 3:30 p.m. Breakout Sessions  
3:30 p.m. - 4:00 p.m. Break  
4:00 p.m. - 5:30 p.m. Breakout Sessions  
6:00 p.m. - 10:00 p.m. Social/Networking Dinner and Fundraiser (Full Buffet Dinner and Fundraiser for \$50/person - This event features salsa dancing lessons and the Consumer Voice raffle)

## THURSDAY, OCTOBER 27

7:00 a.m. - 6:00 p.m. Registration Open  
7:00 a.m. - 8:00 a.m. Breakfast provided by the Consumer Voice  
7:00 a.m. - 8:15 a.m. ALCA Meeting  
8:30 a.m. - 10:00 a.m. Plenary Session  
10:00 a.m. - 10:30 a.m. Break  
10:30 a.m. - 12:00 p.m. Breakout Sessions  
12:15 p.m. - 1:45 p.m. Residents' Rights Luncheon (Luncheon is \$40/person)  
2:00 p.m. - 3:30 p.m. Resident Dialogue with AoA and CMS (By Invitation Only)  
2:00 p.m. - 3:30 p.m. Breakout Sessions  
3:30 p.m. - 4:00 p.m. Break  
4:00 p.m. - 6:00 p.m. Annual Business Meeting for Membership  
6:30 p.m. Dinner on Your Own  
6:30 p.m. - 9:00 p.m. Governing Board & Leadership Council Meetings (Dinner Provided)  
9:00 p.m. - 10:00 p.m. Joint Governing Board and Leadership Council Meetings

## FRIDAY, OCTOBER 28

7:30 a.m. - 8:45 a.m. Breakfast provided by the Consumer Voice  
7:45 a.m. - 8:45 a.m. Roundtable Discussions  
8:45 a.m. - 10:00 a.m. Awards Ceremony  
10:00 a.m. - 11:30 a.m. Closing Plenary  
11:30 a.m. - 11:45 a.m. Closing Remarks  
11:45 a.m. Conference Concludes

# sunday, october 23

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**10:30 a.m. - 12:00 p.m.**

**National Association of State Long-Term Care Ombudsman Programs  
(NASOP) Committee Meetings** (By Invitation Only)

**12:00 p.m. - 1:00 p.m.**

**Lunch on Your Own**

**1:00 p.m. - 5:00 p.m.**

**NASOP Membership Meeting** (By Invitation Only)

# monday, october 24

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8:30 a.m. - 2:30 p.m.

**New State Long-Term Care Ombudsman Orientation** (By Invitation Only) - Breakfast and lunch will be provided. Breakfast is served at 8:00 a.m.

3:00 p.m. - 6:00 p.m.

**Nursing Home Reimbursement Policies Seminar hosted by the Consumer Voice, featuring the Long Term Care Community Coalition (LTCCC)** (Free to Attend)

You do not have to be an expert to make a difference in advocating for state nursing home reimbursement policies that benefit residents. This seminar, by two national experts, will help you understand what you need to know about nursing home reimbursement to participate effectively in your state.

Join Cynthia Rudder, PhD, director of special projects at the Long Term Care Community Coalition, a citizen advocacy group in New York State, and Edward Alan Miller, PhD, MPA, Associate Professor of Gerontology and Public Policy and Fellow, Gerontology Institute, at the University of Massachusetts Boston and Adjunct Associate Professor of Community Health at Brown University, for a free three-hour seminar on the principles of nursing home reimbursement. Both Cynthia and Eddie are experts in how state governments pay nursing homes under Medicaid; Cynthia, from the perspective of an advocate active in her state's reimbursement policy making, and Eddie, from the perspective of a researcher who has conducted numerous studies investigating the determinants and consequences of state reimbursement policy decisions more generally. Through presentation and group activities, you will learn basic reimbursement methodologies and trends and how to use this information to influence nursing home quality, cost, access and encourage culture change. You also will learn about two states where advocates have successfully influenced the direction of nursing home reimbursement to the benefit of consumers.

# tuesday, october 25

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7:00 a.m. - 7:00 p.m.

## **Registration Open**

8:00 a.m. - 12:00 p.m.

## **OmbudsManager Users Group Meeting**

This meeting is for users of the OmbudsManager data entry system to engage in dialogue with Harmony Information Systems and members of the OmbudsManager Users Group.

8:00 a.m. - 12:00 p.m.

## **Citizen Advocacy Group (CAG) Meeting** (By Invitation Only)

12:30 p.m. - 3:30 p.m.

## **Pre-Conference Intensive Workshops**

Pre-conference intensive workshops are available at the extra cost of \$60. The intensive workshops are held concurrently, and attendees may only register for one session. Please sign up at the registration table.

### ***Advocacy for Long-Term Care Consumers***

This session is geared toward any conference participant who would like an introduction, refresher or new tips for advancing long-term care advocacy at a local, state and national level. Specific topics to be covered include: grassroots organizing and strategies for making your voice heard at the state and national level. Speakers will cover the nuts and bolts of advocacy such as: making the case for your issue, how to request legislation, how to craft effective action alerts, how to develop a successful relationship with your elected officials and tips for testifying. Finally, the Consumer Voice staff will provide a brief overview of a new online advocacy tool the organization implemented in spring 2011, and how you can use this tool to participate in national and other policy efforts.

### ***Communication and Conflict Management Between Consumers, Family Members and Professional Caregivers and Staff***

This interactive session will provide concrete tips, tools and strategies to improve communication and manage conflict between individuals receiving long-term care, services and supports, family members and professional caregivers/staff or administration. Consumers and family members often struggle with how to advocate and present their concerns and ideas in a productive manner, and be viewed by professional caregivers and staff as an important and valuable agent for change to help improve the quality of care and life for consumers. This session will be helpful to consumers, family members, family council members, ombudsmen and other advocates interested in working to ensure consumer and family concerns are presented in a constructive way to bring about the best possible care and life for consumers of long-term care, services and supports.

***Involving Consumers in Culture Change*** - Presenters: Sonya Barness; Sonya Barness Consulting LLC; Rose Marie Fagan, Co-Founder and founding Executive Director, Pioneer Network; and Kim McRae, Living the Good Life, Georgia Culture Change Coalition

This presentation will provide an overview of the ways in which consumers are being called into action to advocate for change in how and where we age.

Change in long-term care, from an institutional model to person-centered care, is dependent on consumers creating the demand for this change. This session will share activities at the national and state levels that seek to involve consumers in advocating for change. Participants will discuss and plan how they can engage consumers in advocacy in their own communities and we need to prepare for the “new, informed consumer” as a result of this call to action.

3:45 p.m. - 4:30 p.m.

**First-Timers Orientation** Sponsored by the National Association of Local Long Term Care Ombudsmen (NALLTCO)

Learn how to make the most of your first conference experience; tips and highlights included throughout this welcoming “Meet ‘n’ Greet.”

4:30 p.m. - 5:15 p.m.

**Welcome Remarks** featuring Sarah F. Wells, Executive Director, National Consumer Voice for Quality Long-Term Care; and John Weir, President, National Consumer Voice for Quality Long-Term Care Governing Board

5:15 p.m. - 6:30 p.m.

**Opening Plenary: *The Unfolding Drama in Washington and the Grassroots Advocate’s Role***

Presenters: Anne Montgomery, Senior Policy Advisor, Senate Special Committee on Aging; and Ashley Carson Cottingham (Invited), Staff Director, Subcommittee on Primary Health & Aging, Senate Health, Education, Labor & Pensions Committee

Events happening now in Washington will leave their imprint on long-term care consumers and advocates for years to come. Some are creating opportunities — implementation of long-term care provisions in the Affordable Care Act and the first steps in reauthorization of the Older Americans Act — while deficit reduction threatens not only funding but also consumer protections in Medicaid, Medicare, the OAA and other federal programs. Two Senate staff members at the center of these events describe the unfolding drama in Washington and the role that grassroots advocates can play in shaping it.

6:30 p.m.

**Reception provided by the Consumer Voice**

Join us for the opening night reception in the Center Concourse area (conference registration area of the hotel) for heavy hors d’oeuvres and a cash bar.

# wednesday, october 26

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7:00 a.m. - 7:00 p.m.

**Registration Open**

7:00 a.m. - 8:00 a.m.

**Breakfast provided by the Consumer Voice**

7:00 a.m. - 8:15 a.m.

**NALLTCO Board Meeting** (By Invitation Only)

8:30 a.m. - 10:00 a.m.

**Breakout Sessions**

***Nursing Home Reform in Illinois: How We Did It, How You Can Do It*** - Presenters: Wendy Meltzer, Executive Director, Illinois Citizens for Better Care; and David Vinkler, Associate State Director - Advocacy and Outreach, AARP - Illinois Legislative Office

In 2010, Illinois passed a progressive state nursing home reform law that — among other things — increased nursing home and surveyor staffing levels; increased fines; improved informed consent for psychotropic medications; restricted Medicaid payment for inappropriate psychotropic drugs; placed meaningful controls on medical experimentation on residents; and required better assessments of residents with criminal backgrounds. Two advocates at the center of the campaign to pass the law tell how “serendipity and hard work” brought it about and all that came afterwards to implement it, improve it and keep it from being repealed. Discussion will include working with reporters and networks.

***MDS 3.0 Section Q Implementation - What's Happening?*** - Presenters: Mary Beth Ribar, MS, RN, Technical Director, Division of Community Systems Transformation, Disabled & Elderly Health Programs Group, CMCS, CMS; Becky A. Kurtz, JD, Director, National Long-Term Care Ombudsman Programs, Administration on Aging; and Lori Smetanka, JD, Director, National LTC Ombudsman Resource Center

The revised Minimum Data Set 3.0 (MDS 3.0) went into effect October 1, 2010 and has significantly changed the assessment process and enhanced the opportunity for resident-directed care by including more resident interview items. Specifically, Section Q of MDS 3.0, the “Resident Participation in Assessment and Goal Setting” was created to identify the resident’s goals, their definition of quality of life and care and to determine if the resident wants to reside in the nursing home or explore community options. Presenters will share future changes to the MDS 3.0/Section Q that will improve the process and the resident’s experience during the assessment and interview and discuss best practices in collaboration among agencies involved in providing residents with information about community options and assisting with the transition. Additionally, attendees will have the opportunity to share their experiences and engage in a dialogue with leaders from CMS and AoA.

***Using Olmstead Litigation to Advocate for People who are Unnecessarily Institutionalized*** - Presenter: Kelly Bagby, JD, AARP Foundation Senior Attorney

This session will review Olmstead cases pending around country on behalf of individuals or classes of people who are either at risk of unnecessary institutionalization or are already forced to reside in nursing homes, even though they want to be in community-based settings. The litigation is split between cases on behalf of (1) people who, because of Medicaid cuts to community services, will be forced to seek services in emergency rooms and nursing homes; and (2) classes of people who are forced to remain in nursing homes because their state does not have an effective transition plan. Ombudsmen, family advocates and resident advocates play a critical role in connecting legal advocates with appropriate plaintiffs because of their

relationships with residents and knowledge of the barriers that interested residents face when they try to access community-based care.

***Nursing Home Reform in Health Care Reform—Strategies for Implementation*** - Presenters: Toby Edelman, Senior Attorney, Center for Medicare Advocacy; and Janet Wells, Director of Public Policy, National Consumer Voice for Quality Long-Term Care

Nursing home reforms in the Affordable Care Act are being implemented now. This session examines what CMS is requiring on an array of ACA provisions— including transparency in ownership and expenditures, independent informal dispute resolution, use of civil monetary penalties, reporting suspected crimes in facilities, criminal background checks of workers, posting of survey reports on state websites and changes on Nursing Home Compare. Almost every provision provides an opportunity — or an imperative — for advocacy in your state. The session will focus on strategies to ensure successful implementation.

10:00 a.m. - 10:30 a.m.

### **Break**

10:30 a.m. - 12:00 p.m.

### ***Plenary: Achieving Quality in Changing Times – The Provider and Consumer Perspective***

Presenters: Cheryl Phillips, MD, Senior Vice President, Advocacy, LeadingAge; and David Gifford, MD, Senior Vice President, Quality and Regulatory Affairs, American Health Care Association

Responders: Diane Menio, Executive Director, CARIE, Moderator; Sherry Culp, Executive Director, Nursing Home Ombudsman Agency of the Bluegrass; and Richard Mollot, Executive Director, Long Term Care Community Coalition

Twenty-four years after consumer advocates and nursing home providers reached a consensus that persuaded Congress to pass the Nursing Home Reform Act, the debate over achieving quality continues — against the backdrop of an evolving long-term care system and the potential for critical funding cuts in Medicare and Medicaid. Officers of two major provider associations, who co-chair Advancing Excellence in America’s Nursing Homes and oversee policy and quality care in their organizations, engage in a dialog with consumer advocates about the role that regulation, surveys, financing, staffing, and culture change play in attaining quality.

12:15 p.m. - 1:45 p.m.

### **Boxed Lunch (Available for \$15/person)**

12:15 p.m. - 1:45 p.m.

### ***NALLTCO Membership Meeting***

2:00 p.m. - 3:30 p.m.

### ***Breakout Sessions***

***Using the Law to Advocate for Residents of Long-Term Care*** - Presenters: Steven M. Levin, JD, Founding Partner, Levin & Perconti; Laura Leigh, JD, Founder, Laura H. Leigh, PLC; Kelly Bagby, AARP Foundation Senior Attorney

Two private attorneys who serve on the Consumer Voice Leadership Council and an AARP Foundation attorney discuss practical ways lawyers are working with advocates, residents and families to protect residents’ rights under the law. The discussion will include an overview of federal laws that protect residents; warning signs of abuse and neglect; when legal action is appropriate; and how to work with attorneys when a resident is seriously injured due to abuse or negligence. One of the most common obstacles to lawsuits is mandatory arbitration agreements. An AARP Foundation lawyer explains recent favorable court decisions and legal strategies advocates can use to help family members and others with powers of attorney to avoid

binding residents to contracts that would keep their rights from being vindicated in a court of law.

***Dementia Driven Sexual Abuse*** - Presenters: Lisa Tripp, Assistant Professor, John Marshall Law School; Vice President, Consumer Voice Governing Board; and Sadiqa Reynolds, Chief of Community Building, Louisville Metro Government

This session will focus on the problem of dementia-driven, resident-to-resident sexual abuse. The definition of sexual abuse in federal nursing home regulations requires the perpetrator to willfully intend to abuse, which demented residents are often incapable of. This creates a problem with enforcing abuse regulations against facilities that fail to protect their residents from dementia-driven resident-to-resident sexual abuse. Should sexual abuse be redefined to reflect the experience of the victim, rather than the state of mind of the perpetrator? Come and engage in a lively dialogue and debate around this issue.

***Voices Speak Out Against Retaliation*** - Presenters: Nancy Shaffer, Connecticut State Long-Term Care Ombudsman; Dicie Balash, Project Manager, University of Connecticut/School of Social Work; Michael Michalski, Connecticut Local Long-Term Care Ombudsman

In their own words, five of Connecticut's nursing home residents tell the stories of their lives, the changes when they move into a nursing home, their fears and how they find voice and become empowered to live life to its fullest. Whether a resident, a family member or staff member in a long-term care setting, you will understand better what the experience of retaliation is like for residents, and you will be compelled to explore your own feelings and fears about retaliation for long-term care residents. This video and the resident interviews are based on research by the University of Connecticut Center on Aging and is the result of residents themselves bringing the issue of retaliation out in the open. The DVD includes the video, an Instructor's Guide, the Connecticut Residents' Rights, the University of Connecticut study and a Best Practices Guide.

***National Ombudsman Reporting System (NORS): Train the Trainer*** - Presenters: Sara Hunt, Consultant, NORC; Louise Ryan, Aging Program Specialist, Administration on Aging; Joe Rodrigues, California State LTC Ombudsman and President of NASOP; Eileen Bennett, Ombudsman, Montgomery County (MD) Long-Term Care Ombudsman Program; Kim Shetler, Regional Ombudsman Coordinator, Pennsylvania Long-Term Care Ombudsman Program; and Jackie Majoros, Vermont State Long-Term Care Ombudsman

Facilitator: Shelley Hitt, Colorado State LTC Ombudsman and Chair of the NASOP WINC Committee

**Note: This session will be videotaped.**

Are you looking for ideas on how to keep ombudsmen awake and tuned in during training on NORS? Do you want some new ideas to help with the need for ongoing training to improve consistency in NORS reporting? If you conduct training on NORS for ombudsmen, this session is for you. This session includes information about the development of the NORS training modules, tips for conducting training using the modules for new and experienced and sharing of successful practices from several programs. Join the dialogue and bring your ideas. This session is not a training on the content of NORS modules.

3:30 p.m. - 4:00 p.m.

**Break**

4:00 p.m. - 5:30 p.m.

## Breakout Sessions

### ***Advancing Excellence Campaign: Are you on the Sidelines or in the Fray?***

Presenters: Carol Scott, Missouri State Long-Term Care Ombudsman; and Carol Benner, ScM, National Director, Advancing Excellence in America's Nursing Homes

What good is a campaign if you are not up to your hips in action? There's a huge role for consumers, family/friends and advocates. Come find out the latest information on the Advancing Excellence Campaign, and how you can make a difference in your state. Don't be left out of this national effort to put quality of care on the front burner. QA/PI is the latest buzzword in nursing homes. We'll tell you what it is, and you will walk away with the latest information on topics ranging from reducing staff turnover, consistent assignment to reducing restraints. And more importantly, what you can do to help.

***Local Long-Term Care Ombudsman Systems Advocacy and Specialized Expertise: How Local LTCOs in Michigan are Working to Improve Quality at the Systems Level*** - Presenters: Brittany Koziol, Michigan Local Long-Term Care Ombudsman; Nancy Turner, Michigan Local Long-Term Care Ombudsman; Sharon Greehoe, Michigan Local Long-Term Care Ombudsman; Jenny Cook, Michigan Local Long-Term Care Ombudsman; Toni Wilson, Michigan Local Long-Term Care Ombudsman; Dakima Jackson, Michigan Local Long-Term Care Ombudsman; and Ann Kraemer, Michigan Local Long-Term Care Ombudsman

This panel of Michigan Local Long-Term Care Ombudsmen not only serve as direct advocates for residents for long-term care facilities, but they also engage in very sophisticated and challenging systems advocacy within their ombudsman role. These speakers will each present on the statewide or policy level group in which they participate, and how it can be a bigger platform on which to speak to and promote residents' rights and quality of life improvements.

***Shutting the Door on Scammers: Promising Practices to Combat Exploitation*** - Presenter: Iris Freeman, MSW, Associate Director, Center for Elder Justice and Policy, William Mitchell College of Law

Financial scams are everywhere, and every one of us is a potential target. For elders, however, financial exploitation and scams may be the first step in lost independence that is never recovered. This workshop identifies practical protection tips for elders, regardless of where they live, as well as for their families and caregivers.

***Using Video as an Advocacy Tool*** - Presenters: Diane Menio, Executive Director, Center for Advocacy for the Rights and Interests of the Elderly (CARIE); Lori Walsh, Ombudsman Manager/Videographer, CARIE

Using video, this session will demonstrate the power of story in making your case to the public, press and legislators. We will discuss the integration of various social media including blogs, social networking, etc., in making your case and attracting new audiences. In this session, we hope to generate a lively discussion and expect it to be helpful to any advocate.

6:00 p.m. - 10:00 p.m.

**Social/Networking Dinner and Fundraiser** (Full Buffet Dinner and Fundraiser for \$50/person)

Join us for the social - an evening of food, entertainment and networking with fellow conference attendees. For \$50/person, we will provide a full dinner and entertainment. Salsa lessons will be given, so bring your dancing shoes! A cash bar will be available. Come support the Consumer Voice and bring your travel companions and colleagues!

# thursday, october 27

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7:00 a.m. - 6:00 p.m.

**Registration Open**

7:00 a.m. - 8:00 a.m.

**Breakfast provided by the Consumer Voice**

7:00 a.m. - 8:15 a.m.

**Assisted Living Consumer Alliance (ALCA) Meeting**

8:30 a.m. - 10:00 a.m.

**Plenary: *Building an Improved System of Long-Term Services and Supports***

Presenters: Enid Kassner, Director of Independent Living and Long-Term Services and Supports, AARP Public Policy Institute; Kim Marheine, Ombudsman Services Supervisor, State of Wisconsin Board on Aging and Long Term Care; and David Vinkler, Associate State Director - Advocacy and Outreach, AARP - Illinois Legislative Office

There are numerous ways that states can improve the performance of their long-term services and supports (LTSS) systems. States can make alternatives to nursing homes available, put an effective safety net in place for people who are not able to pay for care, provide support to family caregivers and ensure that LTSS settings are of high quality. This session will provide participants with information to help advocate for a system that achieves those goals. Participants will learn about a first of its kind “state scorecard” on long-term services and supports that measures state performance across a number of different dimensions and can be used to compare one state to another. They will also hear how one high ranking state has worked to improve its LTSS system and how another is using the scorecard as an advocacy tool.

10:00 a.m. - 10:30 a.m.

**Break**

10:30 a.m. - 12:00 p.m.

**Breakout Sessions**

***Anatomy of a State Level Long-Term Care Reform Movement: History, Methods, and Stakeholders and How Each Impacts Reform*** - Presenters: Alison Hirschel, Attorney, Michigan Poverty Law Program; Sarah Slocum, Michigan State Long Term Care Ombudsman, Michigan Office of Services to the Aging

In the past decade, Michigan has gone through multiple rounds of reform efforts to make long-term supports and services more widely available in the community, to streamline access and to imbue services and supports in all settings with person-centered thinking. This workshop will dissect and analyze some of the gains, successes, back-sliding and outright failures Michigan advocates have experienced. The panelists will each give insights and tips from their years of advocacy in LTSS and discuss strategies, important partnerships and advocacy methods that have (at times) helped to move Michigan forward.

***Tools for Improved Consumer Self-Direction - Living the Life You Want*** - Presenters: Hollis Turnham, JD, Midwest Director, PHI – Michigan; Maureen Sheahan, Training and Organizational Development Specialist, PHI – Michigan

More people using Medicaid funded long-term supports and services are being offered and using “self-determination.” Supports are purchased on the basis of what is desired, not what is “available” or “authorized.” And, the Medicaid recipient recruits, hires and supervises the direct care staff -family members, friends or strangers who deliver those services. Learn about the skills and tools

needed and available to actualize “a life you want to live” through employing your own direct care staff.

***Improving Assisted Living Quality Through Medicaid Waivers*** - Presenters: Eric Carlson, Attorney, National Senior Citizens Law Center; Gwen Orłowski, Senior Attorney, Legal Services of New Jersey; and Kathy Poisal, Technical Director, Division of Long-Term Services and Supports, CMCS, CMS (Invited)

Consumers now, more than ever, have access to assisted living facilities as states increasingly apply for Medicaid waivers to cover the cost of assisted living services. But what is required under a Medicaid waiver? What is CMS’s process for determining whether or not it will be approved? How do waivers influence quality in assisted living? And as advocates, how do we influence what is included in a waiver? Join this engaging and lively dialogue about state and federal Medicaid policies in assisted living, and take away strategies for influencing quality in assisted living in your own state.

***Advocates’ Dialogue with the Centers for Medicare & Medicaid Services***  
- Presenter: Alice Bonner, PhD, Director, Division of Nursing Homes, CMS Survey and Certification Group

Engage in a dialogue with Alice Bonner, the director of nursing home survey and certification at the Centers for Medicare & Medicaid Services (CMS). Dr. Bonner assumed her job in 2011 during one of the busiest years in CMS’s regulatory history as new nursing home requirements in the Affordable Care Act are being implemented. She will highlight the status of key provisions, including disclosure of entities that own and operate nursing homes; reporting of nurse staffing information; independent informal dispute resolution; mandatory reporting of crimes in facilities; and significant changes to Nursing Home Compare. This session will also provide an opportunity to discuss issues you identify with the top-ranking federal official in nursing home survey and enforcement.

12:15 p.m. - 1:45 p.m.

**Residents’ Rights Luncheon** (Luncheon is \$40/person)

2:00 p.m. - 3:30 p.m.

**Resident Dialogue with AoA and CMS** (By Invitation Only)

2:00 p.m. - 3:30 p.m.

**Breakout Sessions**

***Federal Responses to Elder Abuse in Long-Term Care Facilities: What Works, What Doesn’t and How can the Federal Government Better Protect Long-Term Care Consumers?*** - Presenters: Alison Hirschel, Attorney, Michigan Poverty Law Program; and Andy Penn, Attorney, U.S. Department of Justice

Legislators, policymakers, researchers and the media have issued periodic and worrisome reports about abuse in long-term care facilities for more than 30 years, focusing first on nursing home and more recently on an array of assisted living facilities. In response, the federal government has enacted laws and created limited initiatives that have provided a fragmented and inadequate response to pervasive abuse and neglect in these facilities. This workshop for advocates at all levels will review the federal government’s efforts to combat abuse in long-term care facilities and propose strategies for a more robust, effective and coordinated federal response.

***Guardianship and Nursing Home Transitions: Between a Rock and a Hard Place*** - Presenter: Brad Geller, Michigan Assistant State Long-Term Care Ombudsman

As we move to increase the options in long-term care, individuals with a guardian face a formidable obstacle in exercising choice. This obstacle affects nursing home residents who want to move into the community and people in the community threatened with institutional care. This session focuses on understanding a guardian's duties in determining where an individual resides; recognizing the reasons a guardian may be resistant to honoring the person's wishes; and developing creative and effective remedies to deal with the recalcitrant guardian.

***Back into the Closet: An Overview of the LGBT Older Adult Experience in Long-Term Care Today*** - Presenters: Eric Carlson, Attorney, National Senior Citizens Law Center; and Robert Espinoza, Senior Director of Policy and Communications, SAGE (Services and Advocacy for LGBT Elders)

This informational session looks at the challenges and disparities faced by older LGBT adults in today's long-term care facilities and details what you can do to advocate on their behalf. We will discuss a recent report that relays stories directly from LGBT older adults and their families and friends as well as recommendations for what advocates, policy makers and providers can do today to address this issue. You will hear directly from advocates implementing these recommendations in long-term care facilities today and will come away up to date on the latest policy happenings (including Medicaid LGBT eligibility issues), successes and resources available.

***Equipping Workers and Empowering Consumers for Quality Home Care*** - Presenters - Hollis Turnham, Midwest Director, PHI; Susan Steinke, Executive Director, Michigan Quality Community Care Council; and Robyn Grant, Director of Advocacy & Outreach, National Consumer Voice for Quality Long-Term Care

Both workers and consumers play a key role in achieving quality home care. Workers need the skills and competencies to provide good care and services, while consumers need to know how to self-advocate and how to be a good employer if they direct their own care. This workshop will discuss ways in which some states are working to better equip direct care workers through trainings, competency evaluations and/or credentialing; how a registry can help and support both workers and consumers who hire their workers; and what the Consumer Voice is doing to educate and empower consumers to receive quality care. Participants will also learn about research being conducted to compile information about direct care worker training requirements in all 50 states and DC.

3:30 p.m. - 4:00 p.m.

**Break**

4:00 p.m. - 6:00 p.m.

**Annual Business Meeting for Membership**

All conference attendees are invited to attend the Consumer Voice Annual Business Meeting; there will be reports from the Governing Board and Leadership Council as well as discussion of public policy resolutions. Please note that only voting group members may vote on policy resolutions.

6:30 p.m.

**Dinner on Your Own**

6:30 p.m. - 9:00 p.m.

**Governing Board & Leadership Council Meetings**

9:00 p.m. - 10:00 p.m.

**Joint Governing Board and Leadership Council Meeting**

# friday, october 28

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7:30 a.m. - 8:45 a.m.

## **Breakfast provided by the Consumer Voice**

7:45 a.m. - 8:45 a.m.

## **Roundtable Discussions**

***Consumer Advocacy for Quality Care*** - Presenters: Robyn Grant, Director of Advocacy and Outreach, Consumer Voice; Jessica Brill Ortiz, Program Manager, Consumer Voice; Jesse Connolly, Director, Campaign for Better Care

Come learn what the Consumer Voice is doing to educate, empower and mobilize consumers around quality care through its Consumers For Quality Care, No Matter Where initiative and its Action Network, and how the Campaign for Better Care is doing similar work. Participants can share and learn new ideas for engaging consumers in advocacy work.

***Family Council and Family Members Meeting*** - Facilitator: Julie Pollock, Local Long-Term Care Ombudsman, Iowa Department on Aging

This meeting provides an opportunity for family members and family council members to network with one another and share strategies, obstacles, successes and resources. The meeting is to stimulate family council development and encourage and support those who are involved in this often challenging and frustrating work. Family members and family council members are welcome to attend.

***Ombudsman Volunteer Management*** - Facilitators: Lori Smetanka, Director, NORC; and Amity Overall Laib, Manager, LTC Ombudsman Program & Policy, NORC

Those joining this informal discussion related to ombudsman volunteer management will have an opportunity to share challenges and best practices around issues such as recruitment, training, mentoring and overseeing volunteer ombudsmen.

8:45 a.m. - 10:00 a.m.

## **Consumer Voice Leadership Awards Ceremony**



### **Bill Bard, Portland, Oregon – Howard Hinds Memorial Award**

The Consumer Voice's Howard Hinds Memorial Award is given in memory of a local Tennessee ombudsman who was a passionate champion for residents and the ombudsman program. Bill Bard is honored for his passion, ability, innovation, and generosity in using his skills to assist ombudsman volunteers, staff, and the ombudsman agency in fulfilling its mission to improve quality care and protect the rights and dignity of residents.



### **Gloria Black, Portland, Oregon – Public Service Award**

The Consumer Voice Public Service Award is given to a person whose work has profoundly expanded public understanding of long-term-care issues. Gloria Black is honored for her extraordinary research and advocacy to focus public attention and government action on the number of deaths among the elderly on bed rails and the need for public education and government action to eliminate this serious hazard in long-term care settings.



**Iris Freeman, St. Paul, Minnesota –  
Elma Holder Founder’s Award**

The Elma Holder Founder’s Award was established in 2002 as a lifetime achievement award for persons whose life work exemplifies leadership in long-term care. Iris Freeman is honored for her extraordinary dedication to consumers of long-term care services and her advocacy for the rights of vulnerable adults for more than 30 years.



**Don Hering, Tallahassee, Florida –  
Howard Hinds Memorial Award**

The Consumer Voice’s Howard Hinds Memorial Award is given in memory of a local Tennessee ombudsman who was a passionate champion for residents and the ombudsman program. Don Hering is honored for efforts that influenced the state regulatory agency to shut down multiple poor-performing assisted living facilities, for his continued work to ensure that the residents of those facilities had a safe place to live and for his advocacy for legislative changes, including discharge protections for assisted living residents.



**Alexandra Kloeckl, Oshkosh, Wisconsin – Howard  
Hinds Memorial Award**

The Consumer Voice’s Howard Hinds Memorial Award is given in memory of a local Tennessee ombudsman who was a passionate champion for residents and the ombudsman program. Xandy Kloeckl is honored for her tireless advocacy for residents in a facility where residents often felt they had no voice, for working to empower residents to speak for themselves when possible and for being their advocate when needed.



**Mary Pike, Madison, Wisconsin – Janet Tulloch  
Memorial Award**

The Consumer Voice’s Janet Tulloch Memorial Advocacy Award was established in memory of author and advocate Janet Tulloch, who was a nursing home resident for more than 20 years, to honor a citizen advocate who has worked with residents to improve the lives of those who receive long-term care. Mary Pike is honored for tirelessly and energetically leading the way for grassroots advocacy in Wisconsin, for her spirit and dignity on behalf of those who are served in long-term care homes and for her dedication to making a permanent and meaningful difference.

10:00 a.m. - 11:30 a.m.

**Closing Plenary: *Learning from the Past to Change the Future***

Presenters: Iris Freeman, MSW, Associate Director, Center for Elder Justice and Policy, William Mitchell College of Law; and Peter Reed, CEO, Pioneer Network; Michael Splaine, Splaine Consulting

11:30 a.m. - 11:45 a.m.

**Closing Remarks**, featuring Sarah F. Wells, Executive Director, National Consumer Voice for Quality Long-Term Care; and John Weir, President, National Consumer Voice for Quality Long-Term Care Governing Board

11:45 a.m.

**Conference Concludes**

# presenters' biographies

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## **Kelly Bagby**

Kelly Bagby is Senior Counsel at AARP Foundation Litigation where she is part of the Health and Long Term Care Legal team. AARP Foundation Litigation acts as co-counsel on systemic reform litigation around the country.

Prior to joining AARP Foundation, Kelly had a comprehensive background in advocacy, oversight, and litigation in health and disability law. Most recently, she served in the U.S. Department of Health and Human Services' Inspector General's office, where she participated in cases involving the investigation and prosecution of failure of care in nursing homes.

Before working for the Federal government, Kelly served as legal director for University Legal Services, the District of Columbia's Protection and Advocacy Program. She was lead counsel for two class actions to protect the rights of vulnerable citizens: *Evans v. Fenty* and *Petties v. District of Columbia*.

From 1993 to 1998, Kelly worked at the Maryland Disability Law Center, where she represented people with disabilities and worked to develop community-based alternatives to nursing homes and other institutional settings. Kelly graduated from Franklin & Marshall College and the University of Baltimore School of Law.

## **Dicie Balash**

Dicie is a Manager and Training Consultant for the University of Connecticut School of Social Work in West Hartford, Connecticut. Dicie serves in that capacity through a partnership between the University of Connecticut and the Connecticut's Department of Social Services (DSS), providing training and organizational development services to the 2500 DSS staff. She has over 30 years of working in a variety of capacity serving the needs of the elderly with 21 years experience in the area of education and training. Dicie's diverse work experiences and education has benefited the department by providing training on topics ranging from social work skills to technical public policy and computer systems. Combined with her consulting efforts with the Connecticut Ombudsman Program, her primary focus is in the area of authoring Web Based Training and serving as the LearnCenter administrator. Dicie holds a BA in Social Work from Valparaiso University, Valparaiso, Indiana and a MA in Political Science from the University of Connecticut.

## **Sonya Barsness**

Sonya is a masters-prepared Gerontologist with nearly 20 years of experience in aging, primarily in long-term care and dementia care. Sonya has been a provider in assisted living and nursing homes. Her more extensive experience is in education, programming, policy, and research related to long-term care, dementia care, and person-centered care. Sonya is currently a consultant and principal of Sonya Barsness Consulting LLC. As a consultant she works with organizations such as Pioneer Network and Planetree to support the enculturation of person-centered values in long-term care and healthcare. She is also adjunct faculty at Virginia Commonwealth University Department of Gerontology. Sonya's passion and vocation is changing the culture of aging, to include promoting personhood in dementia care.

## **Eileen Bennett**

Eileen Bennett is a program manager with the Montgomery County, MD, Long Term Care Ombudsman. She has been with the program for 22 years. She has the primary responsibility for the recruitment, training, and retention of volunteers that resolve complaints for residents of nursing homes and assisted living facilities. She supports the development and active efforts of resident and family councils in long term settings. She is the current Chair, NALLTCO (National Association of Local Long Term Care Ombudsmen). She received the 2010 Howard Hinds Memorial Advocacy Award, a competitive honor through The National Consumer Voice for Quality Long Term Care. She regularly shares her expertise with many other programs in Maryland as they expand their programs to include volunteers. As an advocate, Eileen has worked on many legislative issues on a state and national level. She is an avid supporter of residents' rights for individual living in long term care and their ability to vocalize their ideas about the improvement for quality of life and care. Eileen has been a leader in the effort to standardize training and reporting issues of state and local ombudsmen. She has been involved in multiple workgroups over the past two decades to improve these areas. She assisted in the development of the national core curriculum modules for long term care ombudsmen and participates as a member of the national Ombudsmanager users group to improve data entry and reporting systems.

## **Alice Bonner**

Alice Bonner, PhD, RN, FAANP, has been a geriatric nurse practitioner for the past 20 years. From 1997-2005, she was the Clinical Director of Long Term Care and Geriatrics at the Fallon Clinic in Worcester, Massachusetts. From 2005-2009, Dr. Bonner was Executive Director at the Massachusetts Senior Care Foundation. She is also an Assistant Professor at the Graduate School of Nursing, University of Massachusetts in Worcester, MA.

From 2009-2011, Dr. Bonner was the Director of the Bureau of Health Care Safety and Quality at the Massachusetts Department of Public Health in Boston, MA. She is currently the Director for the Division of Nursing Homes in the Center for Medicaid, CHIP and Survey and Certification within the Centers for Medicare and Medicaid Services (CMS) at the US Department of Health and Human Services in Baltimore, MD. Her research interests include improving nursing home quality, patient safety culture in health care organizations, safe medication prescribing and management, falls prevention and improving care transitions across settings.

## **Eric Carlson**

Eric Carlson, an attorney with the National Senior Citizens Law Center, has specialized in long-term care since 1990. He co-counsels litigation on residents' behalf and advises attorneys from across the country on long-term care issues. Mr. Carlson is the author of numerous publications and articles, including the legal treatise *Long Term Care Advocacy* (Matthew Bender and Co.) and the consumer guide *20 Common Nursing Home Problems, and How to Resolve Them*.

## **Ashley Carson Cottingham (Invited)**

Ashley is Staff Director of the Subcommittee on Primary Health & Aging of the Senate Health, Education, Labor & Pensions

Committee, and previously she was Senior Policy Counsel for the Senate Special Committee on Aging. Prior to coming to the Senate, she was the Executive Director of OWL – The Voice of Midlife and Older Women. She worked closely with the Leadership Council of Aging Organizations as the co-chair of the Income Security Committee and also as co-chair of the Older Women’s Economic Security Taskforce for the National Council of Women’s Organizations.

Ashley is also a newly invited member of the National Academy of Social Insurance. Prior to joining OWL, she worked as a Court Appointed Special Advocate for abused and neglected children (CASA) and with the Vermont Long-Term Care Ombudsman Project, where she advocated for reform of guardianship laws. Before earning her law degree, she worked in Human Resources at a Continuing Care Retirement Community in Portland, Oregon. Ashley received her law degree from Vermont Law School.

### **Jenny Cooke**

Jenny Cooke, BA, is a local Ombudsman working for Citizens for Better Care in central Michigan. She has also been selected to represent the interests of residents on the Michigan Adult Foster Care/Home for the Aged Licensing Council. Jenny lives in central Michigan with her husband and daughter.

### **Sherry Culp**

Sherry Culp has been a long term care ombudsman since 1996. In March of 2009 Sherry became the Executive Director and Bluegrass District Long-Term Care Ombudsman. Sherry has a Masters degree in social work (MSW) from the University of Kentucky and is a KY licensed Certified Social Worker (CSW). Before becoming an ombudsman Sherry was a social worker with Lexington’s Department of Social Services where she provided services to senior citizens. She is a Leader on the council of The National Consumer Voice for Quality Long Term Care in Washington, DC. Sherry has given hundreds of presentations and provided training across the country to ombudsmen, nurses, social workers, residents and their families on topics ranging from navigating the long-term care system to abuse prevention.

### **Toby Edelman**

Toby S. Edelman is an attorney for the Center for Medicare Advocacy. She has advocated on behalf of nursing home residents since 1977. From 1977 through 1999, she was a staff attorney with the National Senior Citizens Law Center, where she was involved in the development and drafting of the Nursing Home Reform Law. Active in the law’s implementation, she represented residents in a variety of task forces and workshops convened by the Centers for Medicare & Medicaid Services. Ms. Edelman was the lead attorney for plaintiffs in *Valdivia v. California Department of Health Services*, in which a statewide class of nursing facility residents successfully challenged California’s refusal to implement the federal nursing home reform law. From 1977-1998, she coordinated a study, supported by the Commonwealth Fund of New York, regarding implementation of the Nursing Home Reform Law. She is a member of the Board of Directors of the Assisted Living Consumer Alliance. She received a BA from Barnard College, an Ed.M. from the Harvard Graduate School of Education and a JD from the Georgetown University Law Center.

### **Robert Espinoza**

Robert Espinoza is the Senior Director of Policy and Communications at SAGE (Services and Advocacy for GLBT Elders). In this capacity, he guides SAGE’s national advocacy program, which includes a federal program based in Washington, DC, as well as 21 local SAGE affiliates across 15 states. He also guides SAGE’s strategic communications approaches and activities. In 2010, he led the historic online launch of the National Resource Center on LGBT Aging, the country’s first federally supported resource center for LGBT elders, as well as a large-scale advertising campaign on LGBT caregiving, which received the 2010 GLAAD Media Award in Advertising for Outstanding Social Marketing. Robert is also leading SAGE’s efforts in the Diverse Elders Coalition (seven national people of color organizations working with low-income elders of color and LGBT elders to advance a federal policy agenda), as well as an HIV and aging advocacy collaboration with GMHC and the AIDS Community Research Initiative of America (ACRIA).

Prior to SAGE, Robert served as the Director of Research and Communications at Funders for LGBTQ Issues, where he led landmark research reports on LGBT issues and authored an original online toolkit — [lgbtracialequity.org](http://lgbtracialequity.org) — that guides foundations in addressing the historical consequences of structural racism on LGBT communities of color. Robert has also held leadership positions at Family Justice, the Service Employees International Union, Justice for Janitors and the Gill Foundation, and has served on national advisory boards for the National Education Association, Justice Matters, the Liberty Hill Foundation, the Audre Lorde Project and the Funding Exchange. Robert received his master’s degree in public policy from New York University and his bachelor’s degrees in English and Journalism from the University of Colorado at Boulder, where he graduated summa cum laude.

### **Rose Marie Fagan**

Rose Marie Fagan is a co-founder and the founding Executive Director of the Pioneer Network, a National Network of individuals who are transforming the culture of aging for the 21st Century. Ms. Fagan coordinated the seminal meeting of Pioneers in 1997 in Rochester and co-authored the widely disseminated final report of that historic occasion. Ms. Fagan speaks all over the nation on nursing home culture change and helps educate the staff of facilities in implementing change. Her activities have included being a resource to states forming statewide networks for culture change. Her most recent initiative is educating consumers about person-directed care and their role as a change agent. She began her work in long-term care as Director of the Monroe County Long-Term Care Ombudsman Program at LIFESPAN. In 1998, she became Project Director of LIFESPAN’s Nursing Home Culture Change Project and in that capacity she was the Project Director for three major research projects in culture change 1998-2002. Ms. Fagan has helped to make Rochester a national center of nursing home culture change, recreating nursing homes as places for living, rather than for decline.

### **Iris Freeman**

Iris C. Freeman, MSW, is Associate Director of the Center for Elder Justice and Policy at the William Mitchell College of

Law. An Adjunct Professor, she co-teaches the Elder Justice and Policy Keystone class, supervises students' policy research and represents the Center as Coordinator of the Vulnerable Adult Justice Project. She taught Community Practice, Advanced Community Organizing and Advocacy courses at the University of Minnesota Graduate School of Social Work from 2003-2008. In 2002, she was honored by the school as its Alumna of the Year and in 2010 as a Distinguished Alumna of the University's College of Education and Human Development.

Ms. Freeman directed the Advocacy Center for Long-Term Care (now the ElderCare Rights Alliance) for over 20 years and was Director of Public Policy at the Alzheimer's Association, Minnesota-Dakotas Chapter from 2000-2003. She has brought long-term care consumer perspectives to state and local working groups and lawmakers since the 1970's as staff in these organizations and, later, as a public policy advisor to seniors' and labor organizations. She publishes widely in professional journals and serves on local and national boards and advisory committees.

#### **Brad Gellar**

Brad Gellar serves as an Assistant State Long-Term Care Ombudsman. He graduated from Northwestern University and received his law degree from Northeastern School of Law. He came to Michigan in 1978 to develop a free legal services program for individuals age 60 or older in a three county region. Subsequently, he established a legislative agenda for older adults while serving as counsel to the Judiciary Committee of the Michigan House of Representatives; and later oversaw the guardianship/conservatorship system as counsel to the Washtenaw County Probate Court. Mr. Gellar has written a number of publications dealing with guardianship, advance directives and long-term care issues and is author of the book, *Changes and Choices: Legal Rights of Older Adults*.

#### **David Gifford**

In May 2011, David R. Gifford, MD, MPH, joined AHCA/NCAL as Senior Vice President of Quality and Regulatory Affairs. In this capacity, Dr. Gifford leads AHCA/NCAL's internal quality department while pioneering initiatives on quality improvement in long term care.

From 2005-2011, Dr. Gifford was Director of the Rhode Island Department of Health, where he refocused the nursing home survey process to promote a more home-like, person centered model. Prior to his appointment as Director of Health, Dr. Gifford served as Chief Medical Officer for Quality Partners of Rhode Island where he directed CMS's national nursing home-based quality improvement effort.

He serves as council chair for the National Quality Forum's Public & Community Health Council and is a member of the National Commission on Prevention Priorities. He served on the National Governors' Association Health Information Communication and Data Exchange Task Force. He currently sits on the Board of the Association of State and Territorial Health Officials (ASTHO) and is a member of their executive committee. He received the National Governor's Association (NGA) public service award in 2010.

He completed his primary care residency and geriatric fellowship at the University of California in Los Angeles (UCLA) after graduating from Case Western Reserve University School of

Medicine. While a Robert Wood Johnson Clinical Scholar, Dr. Gifford received his Master's in Public Health (MPH) in Epidemiology from UCLA. He currently holds a position as clinical Associate Professor of Medicine and Community Health at Brown University.

#### **Sharon Greenhoe**

Sharon Greenhoe, BA, has served as the long-term care ombudsman for Northeast Michigan for two years. Prior to that she was a Regional Executive Director for the American Cancer Society, Great Lakes Division. Her area covered Northern Indiana and Southern and Mid-Michigan excluding the Detroit area. Sharon is a cancer survivor and a self proclaimed 'late bloomer' having returned to college receiving her degree from Spring Arbor University at age 50! Sharon resides near Gaylord with her husband and dog. She has three grown children, is a military mom and has five grandchildren.

#### **Alison Hirschel**

Alison Hirschel serves as the elder law attorney at the Michigan Poverty Law Program where she focuses on long-term care and elder rights issues. Previously, Ms. Hirschel was a staff attorney at Michigan Protection and Advocacy Service and Community Legal Services in Philadelphia. For the past 20 years, Ms. Hirschel has also taught elder law at the University of Pennsylvania and the University of Michigan Law Schools. Ms. Hirschel is a Commissioner of the ABA Commission on Law and Aging, counsel to the State Long Term Care Ombudsman Program and the Michigan Campaign for Quality Care, and past president of The Consumer Voice. She received her B.A. from the University of Michigan in 1981 and her J.D. from Yale Law School in 1984.

#### **Sara Hunt**

Sara S. Hunt, MSSW, has developed and conducted training for long-term care ombudsmen, elders, care providers and state social services employees since 1977. She has a specialization in gerontology and began her career as a social worker in a nursing home. For five years she was the Louisiana State Long-Term Care Ombudsman.

Her expertise is in the areas of care planning, quality of life, and long-term care ombudsman program management, training and ethical issues. As a consultant she has worked with more than thirty-two states and territories. Sara has worked with Carroll Estes and Bill Benson on projects to assess long-term care ombudsman programs in several states. She is a co-author of *Nursing Homes: Getting Good Care There* and has developed national curricula for ombudsmen on the Nursing Home Quality Initiative and basic ombudsman training. The National Long-Term Care Ombudsman Resource Center and the National Association of State Long-Term Care Ombudsman Programs are her primary employers. Sara works from her home office in Tennessee.

#### **Dakima Jackson**

Dakima is a local Ombudsman with SE Michigan, Citizens for Better Care. She represents residents on the Michigan Person-Centered Thinking Training Committee that has developed a basic curriculum to help providers and others be more person-centered in their daily work and interactions with residents.

#### **Enid Kassner, M.S.W.**

Enid Kassner, M.S.W. is Director of Independent Living and

Long-Term Services and Supports for the AARP Public Policy Institute. She oversees research and policy development that focus on expanding consumer access and choice to an array of affordable long-term services and supports options, with an emphasis on improving home and community-based services, supporting family caregivers, and making communities more livable. The mission of the AARP Public Policy Institute is to inform and stimulate sound and creative policies for all as we age. Ms. Kassner's projects have included research on the practices used by state Medicaid programs to ensure the availability of backup home care workers; analysis of state-funded HCBS programs; and a description of the difficulty that consumers have when trying to compare long-term care insurance products.

Under Ms. Kassner's direction, the AARP Public Policy Institute has published *A Balancing Act: State Long-Term Care Reform* and *Across the States: Profiles of Long-Term Care and Independent Living*, in addition to numerous other articles and research reports on LTSS and independent living issues. Ms. Kassner has more than 25 years of experience in the field of aging as a policy analyst, researcher, author, lobbyist and speaker on a broad range of issues, including long-term services and supports, Medicaid and long-term care insurance. She holds an M.S.W. from the University of Maryland and a B.S. from the University of Wisconsin.

#### **Brittany Koziol**

Brittany Koziol, BA, is a graduate of Western Michigan University. Brittany has been an Ombudsman with Citizens for Better Care for six years. She is also the vice-chair of the Michigan Campaign for Quality Care. Brittany lives in Grand Rapids with her husband and two daughters.

#### **Ann Kraemer**

Ms. Kraemer is a local long-term care ombudsman in Southeast Michigan. She has been working in the field of long-term care for nearly 25 years and as an ombudsman for more than three years. A licensed master social worker, Ann will be talking about an "Activity Advocacy" program that was designed and offered to nursing homes in S E Michigan as part of the culture change movement.

#### **Becky Kurtz**

Since July 2010, Becky Kurtz has been the Director of the Office of Long-Term Care Ombudsman Programs within the U.S. Administration on Aging. In this capacity, she promotes effective ombudsman services for our nation's long-term care facility residents and advocates for resident interests at the national level. Ms. Kurtz was Georgia's State Long-Term Care Ombudsman for 16 years. During that time, she served in various leadership roles in the National Association of State Long-Term Care Ombudsman Programs, including serving as its president from 2004-2006. Prior to her ombudsman work, she served as the Advocacy Coordinator for the Senior Citizens Advocacy Project (of the Atlanta Legal Aid Society) and as Assistant Corporation Counsel for the City of New York Law Department. A native of North Carolina, Ms. Kurtz is a 1984 graduate of Emory & Henry College (Emory, Virginia) and a 1988 graduate of Columbia University School of Law.

#### **Laura Leigh**

Laura Leigh obtained her undergraduate degree from the College of William and Mary (B.A. 1992). She completed law school at

the University of Richmond in two and a half years and graduated in 1996. After law school, she served as both an Assistant Commonwealth's Attorney for Fairfax County, and a Fairfax County Circuit Court law clerk for the Honorable Dennis J. Smith, Fairfax County Circuit Court. She is the "LTC Litigation Department" for a boutique personal injury/medical malpractice firm in Leesburg, Virginia. She has built this practice area "from the ground up" and find suing a nursing home to be all too similar to prosecuting a criminal case. It is her goal to build a practice solely in the area of nursing home (and ALF) litigation. She finds the idea of representing the elderly and disabled against the motives of the corporate world to be compelling and fulfilling. She hopes to become more involved in the Consumer Voice, in general (she is already a member), and in the Leadership Counsel, specifically, to deepen her involvement in these worthwhile issues.

Laura has been trained as a Faith Based First Responder, and am "CISM" (Critical Incident Stress Management) certified. As such, she is qualified to support the CIA in its response to major disasters around our nation. This training enables her to be particularly sensitive to and supportive of injured/neglected residents and their families as they negotiate the roads of physical, mental and financial recovery.

#### **Steven Levin**

Steven M. Levin, co-founder of Levin & Perconti in Chicago, is nationally recognized as a pioneer and one of the country's top litigators in the area of long-term care abuse and neglect. Steve was among the first attorneys in the country to represent nursing home and assisted living residents and has consistently achieved record-setting verdicts and settlements for clients in these cases. Steve's vigilance representing victims of nursing home abuse and neglect has brought national attention to this rampant and unacceptable problem, sending a message that mistreatment of one of society's most vulnerable groups will not go unnoticed. Steve has appeared on local and national ABC, NBC and CBS news programs to comment on the epidemic of poor quality care in long-term care facilities. He is actively involved with the National Consumer Voice for Quality Long-Term Care and was named to the organization's Leadership Council in 2010. Steve is a member of the American Association for Justice and a former chairman of the Nursing Home Litigation Group.

#### **Jackie Majoros**

Ms. Majoros has been Vermont's State Long-Term Care Ombudsman and Director of the Vermont Ombudsman Project since 1996. The Vermont Ombudsman Project is housed within Vermont Legal Aid, Inc. (VLA).

From 1985 to 1996, Ms. Majoros was a staff attorney in the Senior Citizens Law Project of VL A. She represented individuals and groups in state and federal court on a wide range of issues including housing, public benefits and guardianship.

Ms. Majoros is a member of Vermont's Medicaid Advisory Board, the National Association of State Ombudsman Programs and the Elder Law Committee of the Vermont Bar Association. She has been appointed to numerous legislative task forces and study committees to represent the interests of Vermonters who receive long term care services.

#### **Kim Marheine**

Kim Marheine holds a bachelor's degree in music therapy and a

master's degree in Community/Agency Counseling, both from UW-Oshkosh. Kim has worked extensively in the area of long term care and dementia, first as a long term care provider for 20+ years, then as Program Director for the Alzheimer's Association of Greater WI, and currently as Ombudsman Services Supervisor for the State of Wisconsin Board on Aging and Long Term Care. Kim has been a frequent presenter on both state and national levels, speaking on a wide array of topics related to maturing adults, dementia and caregiving.

#### **Kim McRae**

Kim McRae comes to long-term care, culture change and person-centered living through an 11-year history as a family caregiver and a consumer of aging services. Experiencing first-hand the system as it is, and wanting better for her mother, Barbara, who had Lewy Body dementia, Ms. McRae has been studying dementia care, long-term care and how to improve quality of life for elders for more than eight years. Together with a B.A. in journalism/advertising from The University of North Carolina at Chapel Hill, a background in consumer marketing, public relations and advertising and a deep desire to help others, she has become a "FCTA" (Family Caregiver Turned Advocate). She promotes and champions person-centered aging services, humanizing dementia care and culture change. In addition to her work with her company Have a Good Life, she serves on the Marketing and Communications Committee and the National Coalitions Committee of the Pioneer Network and is a member of the National Assisted Living Disclosure Collaborative. She is on the Board of Directors of the Consumer Consortium on Assisted Living and is the co-founder and coordinator of the Culture Change Network of Georgia.

#### **Wendy Meltzer**

Wendy Meltzer is executive director of Illinois Citizens for Better Care, the Illinois citizen advocacy group. She has worked for ICBC since 1987, more or less, where she has done her best to force the ICBC position to be considered (and prevail) in every legislative and state administrative policy discussion affecting nursing home residents. She served on the Consumer Voice board for one term. Before ICBC, she was a staff attorney at the Legal Assistance Foundation of Chicago, where she specialized in Medicaid-related issues.

#### **Diane Menio**

Diane Menio joined the Center for Advocacy for the Rights and Interests of the Elderly (CARIE) in 1989 and since 1995 has served as its executive director. Ms. Menio has trained extensively in the detection and prevention of abuse in the home as well as in institutional settings and other issues affecting older adults. In addition, she has consulted with the Pennsylvania Department of Education and the Health Care Financing Administration to develop abuse prevention training for practitioners. She has co-authored several articles on elder abuse and neglect and is a co-author of the book, "Abuse Proofing Your Facility." She received a Master of Science in Gerontology from St. Joseph's University in Philadelphia. Ms. Menio serves on numerous boards and workgroups. In 2007, she received the Advocate of the Year Award from the SeniorLAW Center and in 2009, the United Way of Southeastern PA's Impact in Health Award. She has been an adjunct professor at St. Joseph's University Gerontology program and at the School of Social Policy and Practice at the University of Pennsylvania.

#### **Michael Michalski**

Michael Michalski, B.A. has over 30 years experience advocating for the elderly. For the last 17 years he has been a Regional Ombudsman for the Connecticut Long-Term Care Ombudsman Program. Over the years he has served on many task forces related to improving quality of care and life for residents in long-term care.

#### **Richard Molot**

Richard Molot is the Executive Director of the Long Term Care Community Coalition, which is dedicated to improving care and quality of life for elderly and disabled long-term care consumers. He has conducted research on laws, policies and regulations affecting long-term care quality and oversight and identified best practices and developed recommendations for policymakers, regulators and the general public for improving long-term care quality standards, reimbursement and oversight. He has published reports and spoken on a range of issues, from nursing home staffing and working conditions to autonomy and self-direction in long-term care to reimbursement.

#### **Anne Montgomery**

Anne Montgomery is a senior policy advisor for the U.S. Senate Special Committee on Aging, chaired by Sen. Herbert H. Kohl (D-WI). She is responsible for policy development relating to long-term care, elder abuse and related issues for the Committee's Democratic staff. Earlier, Ms. Montgomery was a senior health policy associate with the Alliance for Health Reform in Washington, DC, where she played a key role in writing and editing policy publications and designing public briefings and conferences for congressional staff and other stakeholders. Ms. Montgomery served as a senior analyst in public health at the U.S. Government Accountability Office and as a legislative aide to Congressman Pete Stark of the Ways & Means Health Subcommittee. She was an Atlantic Fellow in Public Policy in London in 2001-2002, where she undertook comparative research on long-term care in the U.S. and the UK. She also worked as a journalist covering the National Institutes of Health and Congress during the 1990s. A member of the National Academy of Social Insurance, Ms. Montgomery has an MS in journalism from Columbia University and a BA in English literature from the University of Virginia and has done gerontology coursework at Johns Hopkins University.

#### **Sadiqa Reynolds**

Sadiqa N. Reynolds serves as the Chief of Community Building for Louisville, Kentucky. As Chief of Community Building, Reynolds oversees the employees who operate the city's Parks, Public Health and Wellness Programs, Animal Services, Housing and Family Services programs, Human Relations Commission, Libraries and Zoos. Reynolds also serves as the liaison for arts and cultural attractions in the city. Prior to her current position, she served as District Judge for the 30th Judicial Court. Reynolds was also the first African American woman to clerk for the Kentucky Supreme Court when she served as chief law clerk for Justice Robert F. Stephens.

She has also served as the Inspector General for the Kentucky Cabinet for Health and Family Services. Prior to being appointed Inspector General, Reynolds served as an Assistant Director of the Division of Public Works and Assets with Louisville Metro Government as well as Chief of Staff of the Louisville Metro Department of Public Health and Wellness.

Reynolds earned her bachelor's degree in psychology from the University of Louisville and her law degree from the University of Kentucky College of Law.

#### **Gwen Orlowski**

Gwen Orlowski is a Senior Attorney and Supervising Attorney in the Senior Legal Rights Project at Legal Services of New Jersey. Gwen returned to LSNJ in November 2010, after spending three years in the New Jersey Department of the Public Advocate between 2007 and 2010, until the Department was dissolved under Governor Christie. While at the Public Advocate, Gwen served as the Director of Elder Advocacy and Director of Advocacy for People with Developmental Disabilities. In her capacity as Director of Elder Advocacy, Gwen conducted an 18-month investigation of Assisted Living Concepts and its 2006 corporate policy to evict Medicaid-eligible residents. During the course of that investigation, the Public Advocate also participated as amicus curiae in litigation between ALC and the state's Department of Health over the enforceability of promises made by ALC in its Certificate of Need to participate in the Medicaid-waiver program. From January 2010 through October 2010, Gwen served as New Jersey's State Long-Term Care Ombudsman.

Gwen has more than 20 years of experience working with low-income people, including people 60 and over. Between 1994 and 2002, Gwen was a Clinical Associate Professor of Law and Visiting Professor in the Center for Social Justice at Seton Hall School of Law where she supervised a student clinic which focused on the legal needs of homeless clients. She also was Of Counsel to the Clark law firm of Perrotta, Fraser & Forrester, LLC, during this period where specialized in elder law and guardianship work. In 2002, Gwen went to LSNJ where she was a senior attorney and supervisor of both the Anti-Predatory Lending Project and the Senior Legal Rights Project. Gwen has a 1990 law degree from Rutgers School of Law – Newark, and graduated from Georgetown University in 1985 with an AB in Government.

#### **Andy Penn**

Andy Penn is a trial attorney at the U.S. Department of Justice who works on healthcare fraud and heads the department's elder justice task force. Prior to joining DOJ, he was a senior staff attorney at the Bazelon Center for Mental Health Law in Washington, DC, and prior to that he held senior attorney positions at the HHS Office of Inspector General and Maryland Disability Law Center. He is a graduate of the University of California, Berkeley, School of Law.

#### **Cheryl Phillips**

Dr. Cheryl Phillips is LeadingAge's senior vice president for advocacy. She oversees the organization's public policy development, government relations and advocacy efforts to benefit LeadingAge's not-for-profit members and the people they serve.

Dr. Phillips previously served as chief medical officer for On Lok Lifeways, the country's first Program of All-Inclusive Care for the Elderly (PACE) program. In this role, she provided medical leadership for On Lok's 5 corporations and was responsible for medical policy and overseeing all medical affairs and clinical functions for both employed and contracted medical providers. She also served as the chief medical officer for Sutter Select and Medical Director, Chronic Disease Management, for the Sutter

Health System, a network of doctors, hospitals and other health providers who serve more than 100 communities in Northern California.

Dr. Phillips is currently the chair of the board of directors and immediate past-president of the American Geriatrics Society. She is also past president of the American Medical Directors Association. She has served on the California Commission on Aging, as a delegate to the White House Conference on Aging, and a Primary Care Public Policy Fellow at the U.S. Department of Health and Human Services.

Dr. Phillips' post-graduate training includes a family practice residency and geriatrics fellowship at the University of California, Davis Medical Center. She was awarded her doctorate from Loma Linda School of Medicine, Loma Linda, California, and her bachelor's degree in Biology from the University of the Pacific in Stockton, California. Dr. Phillips' certifications include American Board of Family Practice, Certificate of Added Qualifications in Geriatrics and Diplomate and National Board of Medical Examiners.

#### **Peter Reed**

Peter Reed is the CEO of the Pioneer Network. Prior to assuming this position in 2011, Reed served as President and Chief Executive Officer for the Center for Health Improvement (CHI) since 2009, where he was responsible for strategic, operational and financial leadership as well as management of board relations. In addition to his leadership at CHI, he is committed to national and local service in the field of aging, and has a strong professional network that spans the academic, non-profit, governmental and service sectors. He was recently appointed to the Board of Directors of the American Society on Aging and was elected to the Executive Committee of the Sacramento County Adult and Aging Commission in January 2011. Previously, Reed worked with the Alzheimer's Association National Office for five years. In his most senior role, Reed served as Senior Director of Programs, where he was responsible for the development, implementation and evaluation of numerous community programs. His work included the development and launch of the "Quality Care Campaign," a nationwide initiative to improve the quality of care provided to people with dementia in nursing homes and assisted living residences. Reed holds Doctoral and Master's degrees from the University of North Carolina School of Public Health. He is also a Fellow at the UNC Institute on Aging.

#### **Mary Beth Ribar**

Mary Beth Ribar, MS, RN, is a registered nurse with a BS degree in nursing and MS degree in adult education with 16 years clinical experience in intensive care, medical-surgical, home health, & long-term care nursing as well as positions in directing staff development, quality assurance, and infection control in nursing homes (NHs). Her experience at CMS includes work in the Survey and Certification Group, Office of Clinical Standards and Quality, and Centers for Medicaid and State Operations to improve the quality for, and develop quality measures for nursing homes and hospitals. She is currently, in the CMCS Division of Community Systems Transformation is working in the Money Follows the Person (MFP) program as: PO for MFP National Evaluation Contract; and is the MFP subject matter expert for improving NH transitions, elderly population transitions, CMS assessment tools, quality of care outcomes, and the nursing home (NH) minimum data set (MDS) 3.0 Section Q-Return to

Community.

Ms. Ribar is also a CMCS cross-cutting team member to develop and implement quality measures for the Medicaid Affordable Care Act (ACA) provisions; and, most recently, she is the CMCS Disabled and Elderly Health Program Group (DEHPG) programmatic analyst for the Partnership for Patients (PFP) to coordinate Medicaid communications and input to the PFP Campaign and other CMS cross-cutting efforts.

### **Joseph Rodrigues**

Governor Gray Davis appointed Joseph Rodrigues to the position of California State Long-Term Care Ombudsman in August 2002. In this role, Mr. Rodrigues oversees 35 local ombudsman programs, with approximately 1,100 certified ombudsmen who have a regular presence in more than 1,200 skilled nursing facilities and almost 8,000 residential care facilities for the elderly. Mr. Rodrigues has an extensive background in working with elders and adults with disabilities. He has worked in the human services, aging and long-term care system for more than 25 years. Prior to his appointment, Mr. Rodrigues was the Assistant Director of the Alameda County Area Agency on Aging, where he was responsible for the planning, developing and coordinating of social services for elders in his community. Before working for the County of Alameda, Mr. Rodrigues was the Executive Director of St. Peter's Community Adult Day Care Center in San Leandro; the first licensed Adult Day Support Center in the county. Mr. Rodrigues is the President of the National Association of State Long-Term Care Ombudsman Programs and is a member of the American Society on Aging and Sigma Phi Omega, the national academic honor and professional society in gerontology. Mr. Rodrigues earned a Bachelor of Arts degree in Philosophy from St. Patrick's College and a Master of Divinity degree from their graduate school. He also holds a Lifetime Instructor Credential from the California Community College system.

### **Louise Ryan**

Louise Ryan, MPA, currently serves as Ombudsman Program Specialist for the U.S. Administration on Aging. Her primary duties include providing technical support to states on LTC Ombudsman data collection, training, and assistance with policy interpretation of the Older American's Act as it relates to the operations of LTC Ombudsman Programs. Prior her move to AoA Louise was the Washington State Long-Term Care Ombudsman for nearly five years after having served as the Assistant State LTC Ombudsman for nine years. She had responsibility for the statewide LTC Ombudsman Program, all its staff and contractors including a corps of four hundred certified volunteer ombudsmen. Louise's previous work focused on establishing program policy and promoting systems advocacy working with state agencies and with the Legislature to promote legislation improving the quality of care/life for residents.

### **Carol J. Scott**

Carol is the Missouri Long-Term Care State Ombudsman. She has been in this position since 1989. Prior to being the State Ombudsman, Carol was the legislative liaison for the Division of Aging. She was a budget analyst for the Division of Medical Services (Medicaid Program) for two years.

Carol served as the President of the National Association of Long-Term Care Ombudsman Programs (NASOP) from 2000 to 2004. She is a past President of Missouri Volunteer, a statewide

organization representing directors of volunteer programs. She is a member of the statewide Advisory Committee for the SMP program (Medicare Fraud program), Nursing Home Quality Improvement advisory council, CLAIM Advisory Committee (Missouri's State Health Insurance program - SHIP), National Chair of the Consumer Workgroup for the Advancing Excellence in America's Nursing Homes Campaign, and is past President of the Missouri End-of-Life Coalition.

She was on the board for the Central Missouri Food Bank from 1996 to 1999 and is a past President of River City Habitat for Humanity. She is an elder at the First Presbyterian Church in Jefferson City, MO, and is a Reach to Recovery volunteer for the American Cancer Society. She has a BS in Public Administration from the University of Missouri-Columbia, MO.

### **Nancy Shaffer**

Nancy Shaffer, MA, is the Connecticut State Ombudsman for the past six years. Prior to appointment as the State Ombudsman she worked in long term care for nearly 25 years in a variety of business and advocacy roles. Ms. Shaffer received her Master's degree in Human Development/Gerontology from Saint Joseph College, West Hartford, Connecticut.

### **Maureen Sheahan**

Maureen brings over 20 years of leadership in workplace improvement initiatives to PHI. At PHI, she integrates PHI's coaching approach into training, consulting, and grant projects designed to promote culture change, enhance person-centered practices and staff skills, and improve the quality of life for consumers and workers. She has coordinated pilot Home Health Aide Apprenticeships; helped Michigan's Quality Community Care Council to launch its Provider and Consumer Peer Mentoring Initiatives; and contributed to Michigan's "Adult Abuse & Neglect Prevention" Program. She has also led multiple "Consumers as Employers" Train-the-Trainer projects. She contributed to the MI Dementia Competencies Workgroup's Knowledge and Skills Needed for Dementia Care Everyday Language Guide and was lead writer of *12 Steps for Creating a Culture of Retention* and *OPEN: A Case Study of an Effective Employee Retention Project*. Maureen's passion for working with people to promote great, high engagement workplaces and constructive relationships is rooted experiences including managing a unionized, non-profit, worker owned print shop, coordinating a consumer-owned food co-op, serving as a UAW/Ford education advisor and as Executive Director of a labor-management council. She has authored numerous publications and designed and delivered a score of training programs.

### **Kimberly Shetler**

Kimberly Shetler is a graduate of the Pennsylvania State University with a B.S. in Individual and Family Studies with an emphasis on Adult Development and Aging, and 39/40 Credits toward a Master's of Education also from the Pennsylvania State University. She began her work in Aging in 1991 as a Care Manager with the Columbia Montour Area Agency on Aging.

She began her employment with the Pennsylvania State Long-Term Care Ombudsman Office as a Regional Coordinator in 2002. As a Regional Ombudsman Coordinator, Kimberly covers the Southeast and Southeast Central Regions of Pennsylvania. Currently, she serves as a trainer for her regional Tier I sessions, the Tier II Ombudsman Certification Training statewide, the annual recertification training statewide, Pennsylvania

Ombudsman Enrichment training planning, and also coordinates the development of training materials for these sessions each year.

#### **Sarah Slocum**

Sarah Slocum is Michigan's State Long Term Care Ombudsman. She has served in this capacity at the Michigan Office of Services to the Aging since December 1, 2003. Prior to this appointment, Ms. Slocum served as long term care policy staff for AARP Michigan from 2001 to 2003. Her service at AARP followed 7 and one half years as director of the statewide Medicare Medicaid Assistance program. Ms. Slocum served as an Assistant State LTC Ombudsman at Citizens for Better Care from 1984 to 1994, and prior to that spent one year as a VISTA Volunteer working for the Area Agencies on Aging Association of Michigan. Ms. Slocum relies on her 25 years of experience in service to Michigan seniors as she works toward better care and quality of life for Michigan's long-term care consumers.

#### **Mike Splaine**

Mike Splaine is the principal and founder of Splaine Consulting. He previously served as the director for State Policy and Advocacy Programs at the National Office of the Alzheimer's Association in Washington, DC. He has been working with Alzheimer patients and their families since 1986.

#### **Susan Steinke**

Susan Steinke is the Executive Director of the Michigan Quality Community Care Council (QC3). The QC3 is a public authority formed to support Consumers and Individual Providers in home and community based programs, primarily Home Help (MI's personal care program). Susan has been with the QC3 since February 2005 and is its first permanent Executive Director. Prior to the QC3, Susan was at AARP-MI, American Red Cross - Great Lakes Blood Region, and the American Cancer Society - MI, among others.

#### **Lisa Tripp**

Lisa Tripp is an Assistant Professor of Law at John Marshall Law School in Atlanta, Georgia. Prior to joining John Marshall's faculty she was an attorney in the Atlanta regional office of the U.S. Department of Health and Human Services (HHS). While at HHS, she litigated many federal nursing home cases involving physical and sexual abuse, neglect, elopements, falls, pressure sores, malnutrition, and substandard quality of care. Prior to her employment at HHS, Professor Tripp was an associate in the commercial litigation practice group of Smith, Gambrell & Russell, LLP in Atlanta. Professor Tripp received her law degree, with honors, from George Washington University Law School, in Washington, DC.

#### **Nancy Turner**

Nancy Turner, BA, RDH, has served as the long-term care ombudsman for Northeast Michigan for 15 years. She serves on the Michigan Oral Health Coalition and has worked tirelessly for 11 years promoting and educating the importance of oral health.

#### **Hollis Turnham**

Hollis Turnham is the Midwest Director for PHI. She works to improve the quality of direct-care jobs for home health aides, certified nursing assistants, and other direct-care workers in Midwest states. She works with provider, consumer, and worker organizations across the long-term care continuum as well as public policy makers, governmental agencies, researchers,

workforce agencies, and the foundation community to shape new quality care and workforce policy initiatives and improve workplace and caregiving practices. Hollis has over 30 years experience in poverty and aging issues, first as a legal services attorney in Adrian, Michigan and, then, as Michigan's State Long Term Care Ombudsman for almost 16 years. Prior to joining PHI, Hollis was the 1999-2000 John Heinz Senate Fellow in Aging working on aging and long-term care issues for then-Chairman James Jeffords (R-VT) of the Senate Committee on Health, Education, Labor, and Pensions. She has a J.D. from the University of Texas at Austin School of Law.

#### **David Vinkler**

David Vinkler is an associate state director for AARP Illinois. After graduating with a Bachelor's in Political Science from the University of Arizona, he was chosen for the Dunn Fellowship program in August of 2001. Not long after, he became a budget analyst in the Governor's Office of Management and Budget. In this position he was responsible for budget analysis, legislative review and negotiation with the Illinois Department of Commerce and Economic Opportunity and the Illinois Department of Employment Security. In 2003 he became a program analyst in the Illinois Department on Aging, where he was responsible for analysis of data related to the Community Care Program, legislation, and new initiatives. He was also deeply involved in budget preparation and negotiation with the Governor's Office of management and Budget for the Department on Aging. Currently he is the lead lobbyist for Long Term Care issues and Budget for AARP Illinois.

#### **Lori Walsh**

Lori Walsh earned a Bachelor of Science in Elementary Education at Salem State College and worked her way through school as a nursing assistant at a nursing home. After teaching fifth grade, she moved to Philadelphia and returned to long-term care work as the Assistant Director of Therapeutic Recreation at a Center City nursing home. Three years later, she joined the Center for Advocacy for the Rights and Interests of the Elderly (CARIE) as a long-term care ombudsman and volunteer ombudsman Coordinator. She transitioned to the position of Statewide Coordinator of the Health Care Fraud Education Project where she was responsible for expanding the program statewide. In October 2004, Ms. Walsh was promoted to the position of Long-Term Care Ombudsman Coordinator and is responsible for providing ombudsman services for long-term care consumers in North, South, Southwest and West Philadelphia.

#### **Toni Wilson**

Toni Wilson worked as a direct care worker for 15 years after high school in a long-term care facility, a hospital and for a hospice before returning to school for a degree in Human Services. She has been a local long-term care ombudsman for most of the years since 2000 and serves on the Michigan State Long-Term Care Supports & Services Advisory Commission. She is also a longtime member of Michigan Campaign for Quality Care. Toni is the 2008 recipient of the Consumer Voice's Janet Tulloch Memorial Advocacy Award.









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