

# Welcome to the Conference

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What an important year for the Consumer Voice, our partners and our supporters, as we celebrate our 40th anniversary and four decades of advocacy and impact. We couldn't be more pleased that you have joined us for our 2015 Conference, sharing your insights, your experience, your energy and your dedication. It is our sincere belief that the conference and the many engagements together in November will provide for you a superb return on your investment.

This year we will celebrate past accomplishments, but importantly, we must pull together as one voice in continued support of long-term care consumers across the nation. 2015 will also represent an important leadership transition, as we embark on a search for new leadership to guide Consumer Voice into its fifth decade. The Board sees this time as an opportunity to look at the broadened landscape of long-term services and supports and ensure that Consumer Voice maintains a leadership role in determining quality care for all.

Warm regards,



Michael Koenig  
President  
Consumer Voice Governing Board

On behalf of the Consumer Voice staff, I am excited to welcome you to our Annual Conference! The year of preparation leading up to this event has also been a time of reflection as we've looked back on 40 years of advocacy. Each month we've paid tribute, through special Consumer Voice Gems e-blasts, to people and events from our past that have laid the foundation for quality long-term care and taught us about advocacy. People like Elma Holder, Barbara Frank, Sarah Greene Burger, Janet Tulloch, Curmet Forte, and Toby Edelman, and scores of others. There have been many changes in long-term care over these 40 years - where and how people receive services, revised regulations and new quality initiatives. As we've watched these changes take effect, there are a number of basic tenets for our work that have remained constant since the beginning: principles like individualized care; listening to the person receiving the care and services; treating individuals with dignity and respect; respecting individual rights; working collaboratively with others; and emphasizing quality care and quality of life. CARE Matters. Our founders and mentors taught us that and other lessons that we can confidently carry into our future. We are thrilled to have people from throughout our history here with us to celebrate this year. I hope you'll reach out to them, hear their stories, and embrace the lessons so that we can learn from the past to build for our next 40 years!



Lori Smetanka  
Interim Executive Director

# About Us

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

care in nursing homes. 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 of nursing home conditions. The consumer attendees were inspired to develop a platform of common concerns and motivated to form a new organization to represent consumers at the national level. Most of the original members had witnessed and endured personal experiences with substandard nursing home conditions.

Today, Consumer Voice is the leading national voice representing consumers in issues related to long-term care across all settings, helping to empower consumers to advocate for themselves. We are a primary source of information and tools for consumers, families, caregivers, consumer advocates and long-term care ombudsmen to help ensure quality care for the individual. 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. Consumer Voice's mission is to represent consumers at the national level for quality long-term 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 advocacy groups, state and local long-term care ombudsmen, legal services programs, religious organizations, professional groups, nursing home employees' unions, concerned providers, national organizations, residents and other consumers of long-term services and supports, family members and a growing number of family and resident councils.

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

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

# Consumer Voice Governing Board

In 2010, 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 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 provided an excellent opportunity to bring more consumers directly into Consumer Voice's leadership.

## 2014-2015 Governing Board

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



Michael Koenig  
President



Bill Lamb  
Immediate Past President



Gail MacInnes  
Secretary



Paul van Westrienen  
Treasurer



Jonathan Evans, MD  
Member



Hanna Fink  
Member



Yvette Green  
Member



Iris Y. Gonzalez, J.D.  
Member



Mary Ellen Jacobs  
Member



Peter Reed, PhD  
Member



Lori Walsh  
Member



Joshua M. Wiener, PhD  
Member

# Consumer Voice Leadership Council

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## 2014-2015 Leadership Council

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

Brian Capshaw	Steve Levin
Mitzi McFatrach	Althea McLuckie
Heather Porreca	Anne Montgomery
Katharine Bradley	Deanna Okrent
Marianne Bradshaw	Gwen Orłowski
Michelle Brown	Julie Pollock
Josh Casper	Joseph Rodrigues
Carmen Castro	Cynthia Rudder
Carole Hayes Collier	Sarah Slocum
Donna Gillette	Bernie Vonderheide
Jennifer Golle	Patricia Warnick
Shirley Krohn	Karla Warren
Dean Lerner	Lydia Williams

# Consumer Voice Staff

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**Lori Smetanka**, J.D., is currently serving as the Interim Executive Director of the National Consumer Voice for Quality Long-Term Care. She became the Director of the National Long-Term Care Ombudsman Resource Center, funded by the Administration for Community Living, and located at the Consumer Voice, in 2004 to provide technical assistance, support, and training for state and local long-term care ombudsman programs on issues related to long-term services and supports, including prevention of abuse and neglect, and ombudsman program management. Prior to assuming this role, Lori served as Law and Policy Specialist for the Consumer Voice, focusing on the long-term care survey and enforcement system, issues important to long-term care residents, including rights, prevention of abuse and neglect, and providing support to state and local long-term care ombudsman programs. She has a J.D. from the University of Dayton School of Law.

**Robyn Grant**, MSW, is the Director of Public Policy and Advocacy at the National Consumer Voice for Quality Long-Term Care. In this capacity, she is responsible for leading the development and implementation of Consumer Voice's public policy agenda and growing and mobilizing the grassroots network to support the organization's policy work. Prior to assuming this role, Robyn was the Director of Advocacy and Outreach. Before joining 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.

**Amity Overall-Laib**, MA, Manager, Long-Term Care Ombudsman Program & Policy, is currently serving as the Acting Director of the National Ombudsman Resource Center. She joined Consumer Voice in June 2011 and in this capacity she is responsible for developing resources regarding ombudsman program and policy issues; providing technical assistance for ombudsmen; and coordinating training opportunities, including the National State Ombudsman Training Conference and New State Ombudsman Orientations. Prior to joining the Consumer Voice, Amity 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 previously a consultant to NORC and has a master's degree in sociology from the University of Houston.

**Marybeth Williams** joined Consumer Voice in May of 2012 and currently serves as the Public Policy Associate. In her role, she supports the Director of Public Policy in the development and implementation of federal and state legislative and regulatory activities affecting long-term care consumers nationwide. Prior to joining Consumer Voice, Marybeth served three years as a staffer in the United States House of Representatives, where she specialized in health care and senior issues. During her time with Congress, she was instrumental in the introduction of bipartisan legislation concerning specialty medications in Medicare Part D and in the development of legislation to provide medical schools with grants for the establishment of elder abuse prevention and treatment programs. In 2009, she was honored as a "Rising Star on the Hill" by the Women's Campaign Fund alongside other influential female Congressional staffers. Marybeth graduated from Georgia State University in 2008 with a B.A. in Political Science - International Affairs.

# Consumer Voice Staff

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**Amanda Celentano** joined Consumer Voice in September 2013 and currently serves as the Program and Research Associate. In her role, she assists colleagues in pulling data for various projects, oversees the Consumer Voice internship program, and manages office operations. Prior to joining the Consumer Voice staff, Amanda interned with Consumer Voice and the Maryland Long-Term Care Ombudsman Program. She also worked in assisted living facilities and in-home respite care from 2007-2013 and is a proud member of the Maryland Culture Change Coalition. Amanda graduated cum laude from the University of Maryland, Baltimore County with a B.A. in Management of Aging Services and a minor in Sociology.

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

**Alejandra Ona**, Bookkeeper/Accountant

**Christina Steier**, Project Consultant

**Catherine Kohler**, Communications Consultant

**Sara Hunt**, Consultant to NORC

**Maria Greene**, Consultant to NORC

**Jeni Coyne**, Consultant to NORC and the Consumer Voice

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

# Making It Happen: Conference Sponsors

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The Consumer Voice sincerely thanks each of our sponsors for supporting the 39th Annual Conference & Meeting. Sponsor support enables the Consumer Voice to keep registration fees affordable and to offer scholarships to consumers and those who would otherwise be unable to attend.

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## Conference Underwriters

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# Making It Happen: Conference Sponsors

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## Conference Partners

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## Consumer Voice Friends

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Center for Justice and Democracy  
National Association of Social Workers  
Alliance for Aging Research  
Connecticut Long-Term Care Ombudsman Program  
NALLTCO

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## Additional Contributors

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Mary Dalton  
Barbara Frank  
Yvette Rogers Green

# Conference Highlights

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As you review the conference schedule, don't miss these unique opportunities during the 2015 Annual Conference & Meeting.

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

WEDNESDAY, NOVEMBER 4, 5:00PM – 6:00PM

First Time Attendee Orientation (*Studio D*)

*Is this your first time attending a Consumer Voice Annual Conference? If so, please join us to learn more about Consumer Voice, pick up tips to help you make the most of your first conference experience, network with fellow first time attendees, and have some fun!*

WEDNESDAY, NOVEMBER 4, 6:00PM – 8:00PM

Welcome Reception (*Salons 1-3*)

*Join us for the opening night reception in Salons 1-3. The reception will include heavy hors d'oeuvres and a cash bar.*

THURSDAY, NOVEMBER 5, 12:15PM – 2:00PM

Resident Empowerment Luncheon (*Ballroom*)

*We invite you to a special luncheon for residents and advocates.*

THURSDAY, NOVEMBER 5, 6:30PM – 9:30 PM

Consumer Voice's 40th Anniversary Party (*Ballroom*)

*Please join us for a fun celebration of Consumer Voice's 40 years! The celebration will include heavy hors d'oeuvres, cash bar, DJ, dancing, and raffle. Party entry is free with your paid registration. Additional tickets can be purchased for \$95 from the registration desk. Don't forget your ticket!*

FRIDAY, NOVEMBER 6, 12:30PM – 2:30PM

Consumer Voice Awards Luncheon (*Ballroom*)

*Please join us in honoring the 2015 Consumer Voice Leadership Award recipients.*

# Conference Highlights

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FRIDAY, NOVEMBER 6, 7:30PM – 9:00PM

Friday night at the movies – *Alive Inside* (Ballroom)

*Join us for a viewing of the Sundance Audience Award-winning documentary, Alive Inside: The Story of Music & Memory, followed by a facilitated discussion by Ann Wyatt, a member of the Music & Memory Leadership Team. Hear also from Beverley Laubert (Ohio State Long-Term Care Ombudsman) and Heather Bruemmer (Wisconsin State Long-Term Care Ombudsman) about how the Music & Memory Program is being incorporated into long-term care facilities in their states.*

SATURDAY, NOVEMBER 7, 8:30AM – 10:00AM

Plenary: Palliative Care for Persons Living with Advanced Dementia: Why Comfort Matters (Ballroom)

*Comfort Matters™ is a comprehensive, palliative approach to caring for persons living with advanced dementia, developed by the Beatitudes Campus in Phoenix, Arizona. This session will describe some assumptions about persons in different stages of advancing dementia, as well as the proposed principles and practices. Organizational adaptations needed in order to support comfort practices in residential settings will be identified. The Alzheimer's Association, NYC Chapter, worked with three nursing homes in NYC to adapt and implement these practices, and their findings, processes and challenges will also be shared.*

*Presenters: Tena Alonzo, Director of Education & Research, Beatitudes Campus; Ann Wyatt, Coordinator, Palliative Care Project, Alzheimer's Association NYC Chapter*

SATURDAY, NOVEMBER 7 10:30AM – 12:00PM

Closing Plenary – Learning from the Past to Build for the Future (Ballroom)

*As Consumer Voices celebrates its 40th anniversary, join us for a discussion about what made advocacy successful in the organization's past, what's changed over time, and how we can adapt previous strategies or create new ones for today's world. Using a lively talk show format, our "host" will facilitate a conversation among past and present advocacy leaders. Conversation topics will include staying relevant in today's advocacy world, meeting the needs of CV's members, maintaining and strengthening CV values, and more.*

*Panelists: Elma Holder; Barbara Frank; Alice Hedt; Patty Ducayet; Sarah Burger; Brian Capshaw  
Moderator: Diane Menio*



Renaissance Arlington Capital View Hotel  
2800 South Potomac Ave.  
Arlington, VA 22202

# Schedule at a Glance

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## Tuesday, November 3

9:00am – 5:00pm

NASOP Retreat (invitation only) (*Studio B*)

## Wednesday, November 4

8:00am – 12:00pm

New State Long-Term Care Ombudsman Orientation (invitation only) (*Terrace Room, Residence Inn*)

1:00pm – 5:00pm

NASOP Membership Meeting (invitation only) (*Terrace Room, Residence Inn*)

1:00pm – 4:00pm

Intensives

1. Individualized Care Instead of Antipsychotic Medications: It's Really Possible! (*Studio B*)
2. Advocacy Strategies and Appeals – Involuntary Discharge from Nursing Homes and Assisted Living (*Studio D*)

2:00pm – 5:00pm

Consumer Voice Governing Board Meeting (*Studio C*)

4:30pm – 6:00pm

Consumer Voice Leadership Council Meeting (*Studio B*)

5:00pm – 6:00pm

New Consumer Voice Conference Attendee Orientation (*Studio D*)

6:00pm – 8:00pm

Welcome Reception for All Attendees (*Salons 1-3*)

## Thursday, November 5

8:30am – 9:00am

Opening Remarks & Welcome (*Ballroom*)

9:00am – 10:30am

Opening Plenary – Care Matters: Do Survey & Enforcement? CMS Listens (*Ballroom*)

10:30am – 11:00am

Coffee Break

11:00am – 12:15 pm

Workshops

1. Combating the Excessive and Illegal Use of Atypical Antipsychotic Drugs in People with Dementia (LEGAL TRACK) (*Studio B*)
2. Advocacy Strategies Through Managed Care (*Studio F*)
3. Family Power Improves Care (*Studio D*)
4. Unlicensed Care Homes and The Dangers to Residents (*Studio E*)

12:15pm – 2:00pm

Residents Empowerment Luncheon (open to all conference attendees) (*Ballroom*)

2:15pm – 3:30pm

Workshops

1. Protecting Residents' Rights from Arbitration (LEGAL TRACK) (*Studio B*)
2. Challenges with Nursing Home Enforcement (*Studio F*)
3. Quality Improvement Organizations – What They Mean for Residents, Providers (*Studio D*)
4. Addressing the Care Needs of Younger Residents (*Studio E*)

3:30pm – 4:00pm

Break

4:00pm – 5:15pm

Workshops

1. Issues in Assisted Living Litigation (LEGAL TRACK) (*Studio B*)
2. Journey to Culture Change (*Studio F*)

# Schedule at a Glance

3. Protecting Residents from Financial Exploitation (*Studio D*)
4. Transcending Tragedy: Promoting the Rights of Residents with Dementia (*Studio E*)

5:30pm – 6:30pm

Consumer Voice Annual Business Meeting (*Studio E*)

6:30pm – 9:30pm

Reception – 40th Anniversary Party (*Ballroom*)

## Friday, November 6

9:00am – 10:30am

Plenary: Advocating for Real Reform Through the New Federal HCBS Regulations (*Ballroom*)

10:30am -11:00am

Coffee Break

11:00am – 12:30pm

Workshops

1. Consumer Centered End of Life Care: Doing Better in Long-Term Care Facilities (*Studio B*)
2. Long-Term Care Ombudsmen and Legal Services: Collaborations in Advocacy (*Studio F*)
3. Against All Odds: Successful State Advocacy in a Difficult Environment (*Studio D*)
4. Advocacy by Numbers: Using Data to Make Your Case (*Studio E*)

12:30pm – 2:30pm

Awards Luncheon (all conference attendees invited) (*Ballroom*)

2:45pm – 3:00pm

Break

3:00pm – 4:30pm

Workshops

1. CARE Matters: How the New Ombudsman Rule Supports Person-Centered Advocacy (*Studio B*)
2. Improving and Sustaining Nursing Home Transitions (*Studio F*)
3. Staff Stability: Practical Strategies for Advocates to Share (*Studio D*)
4. Meeting Health Needs in Assisted Living (*Studio E*)

4:30pm – 5:00pm

Break

5:00pm – 6:00pm

Group Meetings

1. Assisted Living Consumer Alliance (*Studio B*)
2. National Association of Local Long-Term Care Ombudsmen (*Studio F*)

6:00pm

Dinner on your own

7:30pm – 9:00pm

Friday night at the movies – *Alive Inside: The Story of Music & Memory* (*Ballroom*)

## Saturday, November 7

8:30am – 10:00am

Plenary – Palliative Care for Persons Living with Advanced Dementia: Why Comfort Matters (*Ballroom*)

10:00am – 10:30am

Coffee Break

10:30am – 12:00pm

Closing Plenary – Learning from the Past to Build for the Future (*Ballroom*)

12:00pm – 12:15pm

Conference Closing (*Ballroom*)

# Wednesday, November 4

8:00am – 7:00pm	Registration Open
8:00am – 12:00pm	New State Long-Term Care Ombudsman Orientation (invitation only) (Terrace Room, Residence Inn)
1:00pm – 5:00pm	NASOP Membership Meeting (invitation only) (Terrace Room, Residence Inn)
1:00pm – 4:00pm	<p><u>Intensives</u></p> <ol style="list-style-type: none"><li><p><b>1. Individualized Care Instead of Antipsychotic Medications: It's Really Possible!</b> (Studio B)</p><p>When residents' needs are met, incidences of challenging behaviors are significantly reduced. Focus should be on providing individualized care rather than drugging residents who are upset, angry, or expressing other emotions. But how can this be done? In this intensive, hear from a Nursing Home Medical Director, and an Administrator who have implemented person-centered care practices; work through case examples; and discuss strategies for incorporating these practices into the provision of care.</p><p><i>Presenters: Jonathan Evans, MD; Morris Kaplan, J.D., Gwynedd Square Nursing Center</i></p></li><li><p><b>2. Advocacy Strategies and Appeals – Involuntary Discharge from Nursing Homes and Assisted Living</b> (Studio D)</p><p>Involuntary discharge is consistently one of the top areas of concern in nursing homes and assisted living facilities. How can these incidences be prevented? What are the rights of residents who have been given a discharge notice? What about appeal rights? How are they different in nursing homes and assisted living facilities? Join the experts in a discussion of these issues, strategize responses to case examples, and talk about impacting this issue in your area.</p><p><i>Presenters: Eric Carlson, J.D. Justice in Aging; Joshua Casper, J.D., Casper Law, LLC; Vicki Elting, Assistant State Long-Term Care Ombudsman, Washington</i></p></li></ol>
2:00pm – 5:00pm	Consumer Voice Governing Board Meeting (Studio C)
4:30pm – 6:00pm	Consumer Voice Leadership Council Meeting (Studio B)
5:00pm – 6:00pm	New Consumer Voice Conference Attendee Orientation (Studio D)
6:00pm – 8:00pm	Welcome Reception for All Attendees (Salons 1-3)

# Thursday, November 5

7:30am – 8:15am	Breakfast on your own
8:00am – 7:00pm	Registration Open
8:30am – 9:00am	Opening Remarks & Welcome ( <i>Ballroom</i> )
9:00am – 10:30am	<p>Opening Plenary – Care Matters: Do Survey &amp; Enforcement? Centers for Medicare and Medicaid Services (CMS) Listens (<i>Ballroom</i>)</p> <p>Don't miss this opportunity to speak directly to top officials from the Centers for Medicare and Medicaid Services. After hearing three state and national advocates discuss their experiences with nursing home quality, participants will be able to share their own observations and comments during an open mike session. CMS wants to hear how survey and enforcement impact residents.</p> <p><i>Presenters: Toby Edelman, Senior Policy Attorney, Center for Medicare Advocacy; Mitzi McFatrach, Executive Director, Kansas Advocates for Better Care; Sarah Slocum, Michigan State Long-Term Care Ombudsman</i></p> <p><i>CMS Officials: Karen Tritz, Director, Division of Nursing Homes, Survey and Certification Group; Evan Shulman, Deputy Director, Division of Nursing Homes, Survey and Certification Group (invited); Lisa Tripp, Technical Director for Enforcement and Certification, Division of Nursing Homes, Survey and Certification Group</i></p>
10:30am – 11:00am	Break
11:00am – 12:15 pm	<p><u>Workshops</u></p> <p><b>Combating the Excessive and Illegal Use of Atypical Antipsychotic Drugs in People with Dementia (LEGAL TRACK) (<i>Studio B</i>)</b></p> <p>This session will provide an overview of the prescription and misuse of atypical antipsychotic drugs in people with dementia living in nursing facilities and other long-term care facilities. It will provide an overview of the data indicating the high rate at which these drugs are prescribed. Through case examples, the session will discuss issues related to the prescription of antipsychotic drugs, including the reasons behind the excessive prescription of these drugs and the need to obtain informed consent and legal authorization. The session will conclude with a discussion on strategies that individuals, caregivers, and families can employ to combat the misuse of these drugs in their loved ones. The panel will also discuss litigation that AARP Foundation has undertaken on behalf of families in CA, TN, DE, and NM to highlight the harms of these drugs when given to people with dementia.</p> <p><i>Presenters: Iris Gonzalez, Senior Attorney, AARP Foundation Litigation; Kelly Bagby, Senior Attorney, AARP Foundation Litigation; Jonathan Evans, M.D.</i></p>

## Advocacy Strategies Through Managed Care (Studio F)

Individuals receiving long-term services and supports in both community settings and long-term care facilities are increasingly finding themselves dealing with managed care companies for provision of services. This session will discuss what this means for individual choices and rights, as well as implications and strategies for advocacy.

*Presenters: Heather Bruemmer, Wisconsin State Long-Term Care; Gwen Orłowski, J.D., Legal Services of New Jersey*

## Family Power Improves Care (Studio D)

Family members can play a critical role in ensuring that a loved one in a nursing home receives quality care. In this session, participants will learn the nuts and bolts of individual advocacy, as well as how to develop a strong effective family council to advocate for systemic improvements. Gain tips and strategies to apply in your own advocacy or to share with other family members.

*Presenters: Kathy Bradley, President and CEO of Our Mother's Voice; Addie O'Connell, Family Council Member, Virginia*

## Unlicensed Care Homes and The Dangers to Residents (Studio E)

Serious issues with unlicensed care homes have led to dangerous conditions for residents including financial abuses and human trafficking. Join this session to discuss the various abuses being found in unlicensed care homes, how and where to look in communities to determine where the unlicensed homes are, and what some states have been doing to combat problems.

*Presenters: Catherine Hawes, Regents Professor Emeritus, Texas A&M, School of Public Health; Douglas Anders, Senior Policy Officer, City of Houston, TX; Dean Lerner, Esq., Health Care Fraud Consultant to US Attorney, Northern District of Iowa; Attorney Consultant, Disability Rights Iowa; former Director, Iowa Department of Inspections and Appeals*

12:15pm – 2:00pm

## Residents Empowerment Luncheon (Ballroom)

*Open to all conference participants. Lunch provided by Consumer Voice.*

2:15pm – 3:30pm

## Workshops

### Protecting Residents' Rights from Arbitration (LEGAL TRACK)

(Studio B)

The increase in the prevalence of pre-dispute arbitration clauses in nursing home and assisted living admissions agreements is troubling for residents and families. How can attorneys and advocates educate residents and families about these pre-dispute arbitration clauses and

what they should do when facing one in an admission agreement? Join this session to discuss these and other issues, including the latest advocacy efforts at the federal level to disallow pre-dispute arbitration in long-term care facilities.

*Presenter: Joseph Musso, Esq. Ashcraft & Gerel, LLC*

## **Challenges with Nursing Home Enforcement** (*Studio F*)

Advocates, residents, and family members around the country express ongoing and serious concerns with the nursing home enforcement system - under-citing of deficiencies, low scope and severity coding, and numerous provider appeals to name a few. What can be done to advocate for an effective enforcement system? Hear from advocates that have looked carefully at enforcement data in their states, hear about recommendations, and discuss strategies for action that can be used to address concerns.

*Presenters: Toby Edelman, Senior Policy Attorney, Center for Medicare Advocacy; Richard Molloy, Executive Director, Long Term Care Community Coalition; Pamela Walz, Co-Director, Aging & Disabilities Unit, Community Legal Services*

## **Quality Improvement Organizations – What They Mean for Residents, Providers** (*Studio D*)

QIOs are organized to improve the care delivered to people receiving Medicare through education, outreach, complaint resolution, and quality care reviews. Hear from representatives of a Beneficiary and Family Centered Care QIO and from a Quality Innovation Network QIO about their work to improve care. Discuss with them the types of complaints they handle, when it's appropriate for a resident, family member, or provider to reach out for assistance, and how they work with ombudsmen.

*Presenters: Tara Cooke, Outreach Specialist, KEPRO ; Pamela Meador, RN Project Coordinator for Long-Term Care Services, Quality Insights*

## **Addressing the Care Needs of Younger Residents** (*Studio E*)

Younger adults (ages 31 to 64) are the fastest growing population in post-acute and long-term care, doubling in population size over the past 20 years. Their needs and issues present unique challenges to staff and sometimes, to other residents. Hear the perspective of two younger residents. Learn about the new training curriculum developed by AMDA\* on how to provide better care for the younger adult in post-acute and long-term care. The curriculum is designed to educate medical directors, nursing home staff, surveyors, long-term care ombudsman, and members of Quality Improvement Organizations/Quality Improvement Networks. Gain ideas for how to

use this curriculum in your own advocacy.

\* AMDA is The Society for Post-Acute and Long-Term Care Medicine (formerly the American Medical Directors Association).

*Presenters: Nancy Overstreet, Geriatric Nurse Practitioner; Brian Capshaw, Chairperson, Consumer Voice Leadership Council, Resident Council President, Greensprings Healthcare and Rehab, Executive Board Member Statewide Coalition of Presidents of Resident Councils; Yvette Rogers Green, Consumer Voice Governing Board*

3:30pm – 4:00pm

Break

4:00pm – 5:15pm

## Workshops

### [Issues in Assisted Living Litigation \(LEGAL TRACK\)](#) (Studio B)

Involuntary discharge, contract violations, and deceptive trade practices, are just some of the issues faced by residents and families in assisted living. Legal support, both from private attorneys and legal services attorneys, is critical for these consumers to both protect and assert their rights. Hear from two attorneys currently working on these issues on behalf of residents and discuss strategies for advocacy in the assisted living arena.

*Presenters: Joshua Casper, Esq., Casper Law LLC; Victoria Nugent, Esq., Cohen Milstein Sellers & Toll*

### [Journey to Culture Change](#) (Studio F)

Nursing home culture change practices have not been widely implemented. The most commonly identified challenges are related to surveyors not understanding the practice, cost, and staff resistance to change. This presentation addresses the barriers that nursing homes that try to implement culture change practices face, and one state coalition's journey to help facilities address these barriers. Additional resources will be discussed and demonstrated.

*Presenters: Nancy Kusmaul, Assistant Professor, Baccalaureate Social Work Program, University of Maryland, Baltimore County; Karen Schoeneman, Owner, Karen Schoeneman Consulting, LLC; Patricia Hagen, Director of Memory Care, Charles E. Smith Life Community, Chairperson, Maryland Culture Change Coalition; Eileen Bennett, Director, Montgomery County (MD) Long-Term Care Ombudsman Program*

### [Protecting Residents from Financial Exploitation](#) (Studio D)

When an older person in an assisted living or nursing facility is the target of financial abuse, everyone suffers. Financial losses affect

the resident, the facility and the broader community. The primary victim is the vulnerable resident, robbed of economic security and placed at risk of involuntary discharge or loss of housing for nonpayment. Using Consumer Financial Protection Bureau's manual as a centerpiece, this session will enable a spectrum of conference participants to help protect facility residents from financial exploitation. The session will walk through the four pillars of successful intervention and teach people to prevent, recognize, record and report. A model protocol for prevention and early intervention will be shared, as will assistance to help participants prepare to present in-service trainings and create state-specific manuals.

*Presenters: Naomi Karp, Senior Policy Analyst, Consumer Financial Protection Bureau; Iris Freeman, Adjunct Professor of Elder Justice and Policy, William Mitchell College of Law; Sherry Culp, Kentucky State Long-Term Care Ombudsman*

## Transcending Tragedy: Promoting the Rights of Residents with Dementia (Studio E)

A central goal in supporting people living with dementia is maintaining selfhood, relationships, and well-being to preserve their innate human rights, which requires transcending the common focus on disease and disability. Prioritizing the person, rather than the disease, requires a shift away from the ubiquitous tragedy discourse. This presentation will describe research listening to people living with dementia and engaging them as partners. It will review perspectives on dementia gathered from among hundreds of people living with dementia in a series of listening sessions. Then, recognizing that people living with dementia are the true 'experts' and are capable of participating actively in supportive relationships, it will describe a research-based approach that uses authentic partnerships to include people living with dementia as equal partners in care and support. The presentation will conclude with eight catalyzing principles for transcending the tragedy discourse of Alzheimer's.

*Presenters: Jennifer Carson, Chief Learning Officer, Alzheimer's Resource Center; Peter Reed, Director, Sanford Center for Aging and Professor of Community Health Sciences at the University of Nevada, Reno*

5:30pm – 6:30pm

Consumer Voice Annual Business Meeting (Studio E)

6:30pm – 9:30pm

Reception – 40th Anniversary Party (Ballroom)

Join us in celebrating 40 years of making quality care matter! Enjoy food, cash bar, DJ, dancing, raffle and highlights of Consumer Voice's 40 years. Plus, come dressed as your favorite decade of the last 40 years!

# Friday, November 6

7:30am – 8:45am	Breakfast on your own
8:00am – 7:00pm	Registration Open
9:00am – 10:30am	<p>Plenary – <a href="#">Advocating for Real Reform Through the New Federal HCBS Regulations</a> (<i>Ballroom</i>)</p> <p>Recent federal HCBS regulations set standards for “community-based” services. The regulations present unique questions, challenges and opportunities for states and stakeholders. Some existing models of care may be disqualified from continued HCBS reimbursement, and others will be – or should be – significantly revised. Based on a review of states’ mid-stream implementation, this session will discuss CMS policy and the states’ responses, with a focus on empowering attendees to advocate on the state and federal levels.</p> <p><i>Presenters: Melissa Harris, Deputy Director, Disabled and Elderly Health Programs Group, Center for Medicaid and CHIP Services, Centers for Medicare and Medicaid Services; Eric Carlson, Directing Attorney, Justice in Aging; Becky Kurtz, Director, Long-Term Care Ombudsman Program, Administration for Community Living</i></p>
10:30am -11:00am	Break
11:00am – 12:30pm	<p><u>Workshops</u></p> <p><a href="#">Consumer Centered End of Life Care: Doing Better in Long-Term Care Facilities</a> (<i>Studio B</i>)</p> <p>Individuals with advanced illness and especially those at the end-of-life want and need access to the full range of medical care and treatment options. Patients, families, and their advocates deserve and should demand all the information necessary to make informed choices about their treatment preferences and to have preferences followed by healthcare professionals and institutions. That includes their legally protected choice to forego unwanted medical treatments. Join this session to get the latest information about patient perceptions and preferences around end-of-life care; hear an overview of the federal policy landscape as it relates to patient-centered care and unwanted medical treatment; and learn about the tools and information necessary to provide patients and families with the knowledge they need to get the treatment they want.</p> <p><i>Presenters: Kimberly Callinan, Chief Program Officer, Compassion and Choices; Brian Lindberg, Executive Director, Consumer Coalition for Quality Health Care; Pamela Edgar, End-of-Life Manager, Compassion and Choices</i></p>

## Long-Term Care Ombudsmen and Legal Services: Collaborations in Advocacy *(Studio F)*

Long-term care ombudsmen and legal services attorneys are natural partners in advocacy for residents of long-term care facilities, both at the individual and systemic level. Join a lively discussion around issue and case examples; referrals between programs; and developing collaborative relationships.

*Presenters: Alison Hirschel, Esq., Michigan Elder Justice Initiative; Sarah Slocum, Michigan State Long-Term Care Ombudsman; Pamela Walz, Esq., Community Legal Services; Lori Walsh, Long-Term Care Ombudsman, CARIE*

## Against All Odds: Successful State Advocacy in a Difficult Environment *(Studio D)*

State advocacy “wins” continue to be difficult to achieve given the political environment. States are increasingly reducing budgets, services and consumer protections. Despite this challenging landscape, advocates in Kansas, Washington and California are making progress and/or achieving victories through innovation and collaborations. In this session, participants will learn about the advocacy successes in these three states and the strategies used to attain those successes.

*Presenters: Mitzi McFatrigh, Executive Director, Kansas Advocates for Better Care; Patricia Hunter, Washington State Long-Term Care Ombudsman; Joseph Rodrigues, California State Long-Term Care Ombudsman*

## Advocacy by Numbers: Using Data to Make Your Case *(Studio E)*

Whether it's advocating for better care, prevention of abuse, or for more funding for your ombudsman program, data can help make your case. Join this session to learn how data, such as Nursing Home Compare and the National Ombudsman Reporting System (NORS), is being used in advocacy and education efforts.

*Presenters: Louise Ryan, Long-Term Care Ombudsman Program Specialist, Administration for Community Living; Richard Mollot, Executive Director, Long Term Care Community Coalition*

12:30pm – 2:30pm

## Awards Luncheon (*Ballroom*)

*Lunch provided by Consumer Voice; open to all conference attendees*

### Janet Tulloch Memorial Advocacy Award

This award was established in 2000 after the death of Janet Tulloch, a nursing home resident, author, committed advocate and long-time member of the Consumer Voice's Board of Directors. It honors a **citizen advocate, family caregiver** or **long-term care consumer** who has worked directly with and for consumers to improve the lives of long-term care consumers.



### *Ann Williams, family caregiver*

Ann Williams has cared for several family members – first her mother and sister who had dementia and then her daughter's son who had muscular dystrophy. Prior to her retirement, in 1995, Ann was named by Governor Zell Miller as a Governor's Delegate to the National 1995 White House Conference on Aging, held in Washington D.C. Later, she was named as a member of the Clinton/Gore '96 Georgia Advisory Committee on Aging Issues. In 1997,

she was appointed to the Georgia Council on Aging and served as Senior Week Chair for two years, served as Co-Age Chair for two years, and served as Legislative Chair for seven years. Ann continues to serve on the Legislative Committee and continues to work with legislators and testify on bills designed to help and protect seniors. Additionally, Ann serves on the Aging Services Task Force of the Atlanta Regional Commission and as a Board member of the Georgia Gerontology Society. In 2004, Ann began serving as Chair of the Long Term Care Ombudsman Advisory Council, where she legislatively advocates with the Office of the State Ombudsman on issues concerning improvement of the lives of long-term care residents and consumers.



## *Rosemary Pavelko, long-term care resident*

Rosemary (Rosey) Pavelko has been volunteering since a very young age. She worked for The Marriott and Nestle Corporation before she became disabled and was no longer able to work. In 2005, Rosey became the Utah State Housing Chairman for the Legislative Coalition for People with Disabilities. In 2008, she enrolled at Mt. Aloysius College and earned her Bachelor's Degree in Business Administration; and in 2012, she

received her Master's Degree in Business Administration. She worked as a PEER Support Specialist for the Alternative Community Resource Program in Johnstown, PA from 2010-2013. In 2013, Rosey was diagnosed with breast cancer, and she is currently in treatment. Rosey graduated from the Pennsylvania's Office on Aging Ombudsman PEER Program in February 2015 and she advocates for herself and other residents on a daily basis.

## **Howard Hinds Memorial Award**

The Hinds Award was established in 2005 in memory of the late Howard Hinds, a Tennessee District Long-Term Care Ombudsman. Howard was a true champion for residents and for the ombudsman program as well as a passionate advocate on national issues. The award honors an ombudsman who has effectively **advocated for long-term consumers on the local level.**



## *Joan Rixom, Ombudsman Volunteer*

Joan Rixom is a retired nurse and educator and has been a volunteer Ombudsman with the West Central Long-Term Care Ombudsman Council in Florida for 8 years and was the 2015 Florida Statewide Ombudsman of the Year. Last year as a volunteer Ombudsman she resolved 53 complaint cases and

conducted 25 assessments all while serving as the West Central State Council Representative, State Council Vice Chair, and volunteering to advocate for children in the Guardian ad Litem Program. Ms. Rixom says she became an ombudsman "because all my life I have been associated with caring, as an older child, a mother, a nurse, a teacher

of nursing and an education director. I realized I had a background that could be used to continue to provide caring, so I became an ombudsman. This is basically why I continue to be in the program. I can give what is most valuable to the elderly, time, time to listen, to help, to recognize past lives and experiences, to attest that the elderly have contributed more than they are usually credited with and give a sense of dignity at a time they may feel deprived of it. Anyone can give money (small or large amounts) but giving time is more valuable and personally satisfying. This may sound flowery, but in fact we all need this feeling and the elderly most often are the ones most in need of this caring.”



### *Scott Bartlett, Ombudsman*

Scott Bartlett has been an Ombudsman with the Pikes Peak Area Council of Governments for over ten years. Currently, Scott is co-chair of the region’s Long-Term Care Ethics Committee and sits on the Pikes Peak Elder Abuse Coalition committee. Scott has a strong sense of public service and a passion for civil rights and is dedicated to advocating for people residing in care facilities. He believes in collaboration with the community and partner

agencies as the best means for creating change. Prior to becoming an Ombudsman, Scott worked on behalf of adults and children with disabilities as a case manager. He resides in Woodland Park, CO and enjoys spending time with his son in the outdoors and enjoying the Western lifestyle.

## **Cernoria Johnson Memorial Advocacy Award**

Cernoria McGowan Johnson (1909-1990) set up the national program of Nursing Home Ombudsmen in 1974. The award in her honor is presented to someone whose work has had **national impact** or is a **model for national excellence** and who exemplifies accomplishment in his or her chosen field.



### ***Beverley Laubert, Ombudsman***

Beverley Laubert has been an ombudsman for twenty-eight years, including twenty-one as the State Long-Term Care Ombudsman in Ohio. She holds a Bachelor of Arts in Gerontology from Kent State University and a Master of Arts from The Ohio State University's John Glenn College of Public Affairs, with an emphasis on strategic leadership and long-term care. She leads statewide ombudsman advocacy for long-term care consumers by participating in policy discussions with executive agencies and the legislature. She has provided invited testimony before the National Commission on Quality Long-Term Care and the United States Senate Special Committee on Aging. Beverley held two terms as President of the National Association of State Long-Term Care Ombudsman Programs and was a member of the Leadership Council of the ConsumerVoice. In 2014 she was elected as Chairman of the Board of the national Advancing Excellence in Long-Term Care Collaborative. In 2012, she received the Ohio Governor's Award for Employee Excellence.

## Janet Wells Public Policy Leadership Award

The Consumer Voice's Policy Leadership Award recognizes an individual who has provided **exemplary leadership in the public policy field** in advancing quality of care and quality of life for residents receiving long-term care services.



### *Richard Mollot, Executive Director of the Long Term Care Community Coalition*

Richard Mollot is the executive director of the Long Term Care Community Coalition (LTCCC), a nonprofit organization dedicated to improving care for seniors and the disabled through legal and policy research, advocacy and education. Richard has served on a number of state and national consumer and government advisory groups relating to such issues as: dementia care; nursing home and assisted living standards; mandatory managed long-term care; and nursing home financing and quality improvement.

Richard has written and presented trainings on a variety of Long-Term Care issues, including: *Residential Care in the United States: A Persistent Struggle for Quality, Dignity & Independence*; *Safeguarding Nursing Home Residents & Program Integrity: A National Review of State Survey Agency Performance*; *Assisted Living Law & Policy*; *Federal Requirements Regarding Dementia Care & Antipsychotic Drugs*; *Caring & Planning for an Aging Person With Disabilities*; and *Informed Consent Rights in U.S. Nursing Homes: An Overview of State & Federal Requirements*. He is a graduate of Howard University School of Law and a member of the Maryland Bar.

## **Toby S. Edelman Legal Justice Award**

This award was created in 2009 to honor those who, working through or with the legal system, go to **extraordinary lengths to achieve justice for long-term care consumers**. It is named in honor of Toby Edelman of the Center for Medicare Advocacy, whose work for more than 30 years has influenced and shaped long-term care law, policy and enforcement.



### **Margaret Farley, Attorney**

Margaret Farley, BSN, JD, is a practicing attorney with an office in Lawrence, KS. She primarily represents individuals who have been injured, abused or killed by negligent nursing home and assisted living care, mostly in northeast Kansas. Ms. Farley has authored legal articles on long-term care and several consumer publications on the same topic. She is a former

president of the Kansas Association for Justice, the Legacy of Justice Foundation (Kansas), Kansas Advocates for Better Care and the Consumer Voice (Washington, DC). Ms. Farley is currently an officer of Kansas Advocates for Better Care. She is a 1974 graduate of the Kansas University school of nursing and a 1988 graduate of the KU school of law. She has testified on long-term care issues before the Kansas legislature many times. Ms. Farley was a home health nurse, and a discharge planner at Shawnee Mission Medical Center before she entered law school. She first practiced at the Kansas City law firm of Smith, Gill, Fisher and Butts (now Bryan Cave). From 1990 through 1996, Ms. Farley was the Executive Director of KABC.

## Public Service Award

The Consumer Voice Public Service Award recognizes an individual or organization whose work has profoundly expanded coverage and public understanding of long-term care issues.



## *California Advocates for Nursing Home Reform (CANHR)*

Since 1983 and under the leadership of Patricia L. McGinnis, co-founder and Executive Director, the California Advocates for Nursing Home Reform (CANHR), a San Francisco-based statewide consumer advocacy organization, has been dedicated

to improving the choices, care and quality of life for California's long-term care consumers. Through administrative and legislative advocacy, CANHR has been instrumental in the enactment of major policy, regulatory and legislative changes that have provided significant protections for California's elders. CANHR has also become a clearinghouse in California for long-term care and elder financial abuse issues with policy makers, legal services staff and consumers relying on CANHR's expertise in this area. Ms. McGinnis and California Advocates for Nursing Home Reform have received numerous awards and recognitions for their nursing home advocacy work over the years.

## Elma Holder Founder's Award

Established in 2002 as a lifetime achievement award to honor a person whose life work **exemplifies leadership in the field of long-term care reform**, the award is also a tribute to Elma Holder, the Consumer Voice's founder and friend. Elma's personal commitment, integrity and vision shaped the organization and quality of care and life in long-term care.



### *Toby S. Edelman, Senior Policy Attorney, Center for Medicare Advocacy*

Toby S. Edelman has been representing older people in long-term care facilities since 1977. As a Senior Policy Attorney with the Center for Medicare Advocacy since January 2000, Ms. Edelman provides training, research, policy analysis, consultation, and litigation support relating to nursing homes and other long-term care facilities. Under two grants from the Commonwealth Fund, she evaluated the federal nursing home survey and enforcement system and its impact on state activities and provided technical assistance to states on effective enforcement practices. In cooperation with the Centers for Medicare & Medicaid Services, she recently completed a Commonwealth Fund project to evaluate seven states' deficiency citations for misuse of antipsychotic drugs. Since September 1999, she has written a monthly newsletter on nursing home enforcement issues. Ms. Edelman was the lead attorney for a statewide class of nursing facility residents who successfully challenged the state of California's refusal to implement the federal Nursing Home Reform Law (*Valdivia v. California Department of Health Services*, Civ. No. S-90-1226 EJM (E.D. Calif. 1993)). As a beneficiary representative, Ms. Edelman has testified before Congress and served on federal task forces, technical expert panels, and working groups on nursing home issues. Ms. Edelman received a B.A., magna cum laude, from Barnard College (1968), an Ed.M. from the Harvard Graduate School of Education (1969), and a J.D. from the Georgetown University Law Center (1974).

# Friday, November 6

2:45pm – 3:00pm

Break

3:00pm – 4:30pm

## Workshops

### **CARE Matters: How the New Ombudsman Rule Supports Person-Centered Advocacy** (*Studio B*)

Learn more about selected provisions in the federal Long-Term Care Ombudsman Program Rule published in 2015 and why they matter. These historic regulations – the first federal regulations for the Ombudsman program since its inception in the 1970s – establish national standards for how Ombudsman programs serve individuals living in long-term care facilities. Join the dialogue on topics such as consistent, person-centered approaches to resolving complaints, including complaints of abuse. Don't miss this opportunity to learn more about the potential impact on the program in your state, bring your questions, and share your perspectives. Gain ideas from other presenters and attendees on implementation approaches and effective practices.

*Presenters: Becky Kurtz, Director, Office of Long-Term Care Ombudsman Programs, Administration for Community Living, Administration on Aging; Joani Latimer, Virginia State Long-Term Care Ombudsman; Greg Shelley, Volunteer Coordinator/Staff Ombudsman, Harris County Long-Term Care Ombudsman Program, Houston, Texas*

### **Improving and Sustaining Nursing Home Transitions** (*Studio F*)

Efforts to move nursing home residents back into the community have been impeded by obstacles impacting both the number of individuals transitioning and the success of the actual transitions. Learn about these barriers and recommendations for overcoming them based on research into Section Q as well as a national study of what nursing home residents who had transitioned experienced and believe would improve the transition process. Hear about an exciting approach to sustaining nursing home transitions in Washington state that could be used to continue transition work when the Money Follows the Person program ends in 2016. Gain strategies to take back to your own state.

*Presenters: Jeni Coyne, Consultant, National Ombudsman Resource Center and Consumer Voice; Cynthia Rudder, Long-Term Care Consultant; Dan Timmel, Medicaid Long-Term Care Policy, Centers for Medicare and Medicaid Services*

### **Staff Stability: Practical Strategies for Advocates to Share** (*Studio D*)

This session describes key practices and resources for staff stability that advocates can share with providers in their community. Participants will gain knowledge about good practices for recruiting, hiring, and orienting new staff, and above all, for retaining good staff through consistent assignment. Many nursing homes commit to consistent

assignment in theory, but face barriers to implementation that leave them well short of consistent assignment in fact. Learn the step-by-step how-to for implementing consistent assignment and overcoming common barriers. Find out how management strategies can maximize consistent assignment by using staff's deep knowledge of residents to shape care and quality improvement. These practices create the good teamwork and supportive environment that are key to keeping new and long-time employees.

*Presenter: Barbara Frank, B&F Consulting*

### Meeting Health Needs in Assisted Living (*Studio E*)

More and more, assisted living residents have significant ongoing health care needs. From state to state and facility to facility, there is great variation in how these health care needs are addressed. Based on an ongoing project in California to consider systemic changes, the session will describe some common models, including on-staff nursing, use of home health agencies and hospice agencies, nurse delegation, and increased training of direct-care staff. The session will include sharing and discussion among participants.

*Presenters: Eric Carlson, Senior Directing Attorney, Justice in Aging; Cindy Eggleston, Registered Nurse, Regional Director of Health & Wellness, Brightview Senior Living*

4:30pm – 5:00pm

Break

5:00pm – 6:00pm

### Group Meetings

1. Assisted Living Consumer Alliance (*Studio B*)

2. National Association of Local Long-Term Care Ombudsmen (*Studio F*)

7:30pm – 9:00pm

Friday night at the movies - *Alive Inside: The Story of Music & Memory* (*Ballroom*)

Join us for a viewing of the Sundance Audience Award-winning documentary, *Alive Inside: The Story of Music & Memory*, followed by a facilitated discussion by Ann Wyatt, a member of the Music & Memory Leadership Team. Hear also from Beverley Laubert (Ohio State Long-Term Care Ombudsman) and Heather Bruemmer (Wisconsin State Long-Term Care Ombudsman) about how the Music & Memory Program is being incorporated into long-term care facilities in their states.

# Saturday, November 7

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8:00am – 12:15pm

Registration Open

8:30am – 10:00am

Plenary – **Palliative Care for Persons Living with Advanced Dementia: Why Comfort Matters** (*Ballroom*)

Comfort Matters™ is a comprehensive, palliative approach to caring for persons living with advanced dementia, developed by the Beatitudes Campus in Phoenix, Arizona. This session will describe some assumptions about persons in different stages of advancing dementia, as well as the proposed principles and practices. Organizational adaptations needed in order to support comfort practices in residential settings will be identified. The Alzheimer's Association, NYC Chapter, worked with three nursing homes in NYC to adapt and implement these practices, and their findings, processes and challenges will also be shared.

*Presenters: Tena Alonzo, Director of Education & Research, Beatitudes Campus; Ann Wyatt, Coordinator, Palliative Care Project, Alzheimer's Association NYC Chapter*

10:00am – 10:30am

Break

10:30am – 12:00pm

Closing Plenary – **Learning from the Past to Build for the Future** (*Ballroom*)

As Consumer Voices celebrates its 40th anniversary, join us for a discussion about what made advocacy successful in the organization's past, what's changed over time, and how we can adapt previous strategies or create new ones for today's world. Using a lively talk show format, our "host" will facilitate a conversation among past and present advocacy leaders. Conversation topics will include staying relevant in today's advocacy world, meeting the needs of CV's members, maintaining and strengthening CV values, and more.

*Panelists: Elma Holder; Barbara Frank; Alice Hedt; Patty Ducayet; Sarah Burger; Brian Capshaw*

*Moderator: Diane Menio*

12:00pm – 12:15pm

Conference Closing (*Ballroom*)

# Presenters' Biographies

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## Tena Alonzo

Tena Alonzo is a healthcare provider with expertise in caregiving practices for people with thinking or memory disorders. She has nearly 30 years experience as a long-term care provider and researcher working to enhance the lives of persons with dementia. Her expertise addresses evidence-based practices in dementia care, specifically practices that emphasize a person-first, person-directed approach that improves quality of care and quality of life for persons with dementia. Ms. Alonzo's research focuses on developing comfort-focused best practice for addressing dementia-related behavior, decreasing antipsychotic, anxiolytic and sedative medications, enhanced pain management, eliminating physical restraints, rejection of care, understanding behavior as a method of communication, dining and nutrition concerns, fall reduction and education of caregiving staff in understanding the progression of dementia.

Currently, Ms. Alonzo is the executive vice president of education and research and director of Comfort Matters™, a dementia care education program, at Beatitudes Campus in Phoenix, Arizona. Beatitudes Campus is a faith-based not-for-profit continuing care retirement community offering a wide spectrum of services for older people including independent living, assisted living, skilled nursing, memory support and home care services. The Comfort Matters™ model has been introduced to thousands of long-term care staff, medical providers and students throughout the world and the concepts have been replicated in long-term care communities and assisted living organizations in the United States. Ms. Alonzo is education director for Palliative Care for Advanced Dementia Training and Implementation Project in New York City in conjunction with the Alzheimer's Association New York City Chapter.

Ms. Alonzo's work has been published in 25 scholarly journals and books. Journal articles including *The Gerontologist*, *Journal of Hospice and Palliative Nursing*, *American Journal of Alzheimer's Disease and Other Dementias*, *Annals of Long-Term Care*. Her work has been published in the book, *Palliative Care for Advanced Alzheimer's and Dementia: Guidelines and Standards for Evidence-Based Care*, which won the 2010 American Journal of Nursing Book of the Year Award in both Gerontologic Nursing and Hospice and Palliative Care. Ms. Alonzo's work has also been featured in national media, including The New York Times, Boston Globe, Global Mail and New Yorker Magazine, as well as the Public Broadcasting System and British Broadcasting Corporation. Beatitudes Campus and Comfort Matters™ have been honored with the Excellence in Research and Education Award from LeadingAge, the Award of Honor from LeadingAge Arizona, Promising Practices Award from Mather Lifeways Institute of Aging and the Public Trust Award from LeadingAge.

As an educator, Ms. Alonzo speaks nationally and internationally, as a keynote speaker, featured speaker, panel member and facilitator on evidence-based, caregiving practices for people with dementia and currently serves as a technical expert for the Initiative to Improve Dementia Care and Reduce Antipsychotic Medication for the Centers for Medicare and Medicaid. She has introduced and educated long-term care staff, medical providers and students throughout the world to the Comfort Matters™ model. Additionally, Ms. Alonzo has presented information on dementia and caregiving practices to hundreds of public audiences, interest groups, support groups and families to generate public awareness, communicate research outcomes and encourage public engagement on the topic of dementia care.

Ms. Alonzo earned a B.S. in Psychology/Biology (1983) and an M.A. in Theoretical Psychology (1985) from Northern Arizona University.

# Presenters' Biographies

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## Douglas Anders

Douglas Anders is a Senior Police Officer assigned to the Mental Health Unit, Houston Police Department as coordinator for strategy development in addressing issues in Unlicensed Assisted Living Facilities and Group Homes as well as conducting officer training in Mental Health Issues. With 36 years of law enforcement experience, Mr. Anders has developed instructional block and training materials, Houston Police Academy in conjunction with Alzheimer's Association Houston and Southeast Texas to familiarize CIT trained police personnel with issues regarding individuals with Alzheimer's; coordinated an Unlicensed Assisted Living Facility monitoring program and works with other state and local agencies to address issues regarding conditions in unlicensed facilities through development of ordinances and enforcement strategies; and is currently the project coordinator for the 911 Diversion Program, an integration of crises counselors in the Houston Emergency Center Dispatch Facility, as well as for the Senior Justice Assessment Center, where he coordinates law enforcement training and is the Law Enforcement Liaison with the agencies involved in the development of the Center. Mr. Anders is a Master Peace Officer for the State of Texas and a Certified Mental Health Peace Officer.

## Kelly Bagby

Kelly Bagby is a Senior Attorney at AARP Foundation Litigation (AFL) and specializes in civil rights, disability rights, special education, health law, and other public interest areas, with an emphasis on litigation. She has been a part of AFL's Health Team since 2008. She has litigated a range of discrimination and public interest cases in federal and state courts. Prior to joining AFL, she worked for the Office of Counsel for the Office of Inspector General (OIG) for the United States Department of Health and Human Services. Kelly has served as class counsel in a number of cases that have permitted people to age in place in the community rather than be forced to have their long-term services provided in nursing facilities. *Darling v. Douglas (Cota v. Maxwell-Jolly)*, 688 F. Supp. 2d 980 (N.D. Cal. 2010); *Thorpe v. District of Columbia* (Case No. 10-02250). Kelly was also co-counsel for a class of California nursing facility residents in *Levine v. Ventura Convalescent Hospital* who were administered psychotropic medications without informed consent.

## Eileen Bennett

Eileen Bennett has been a long-term care ombudsman in Montgomery County since 1989. She has been the director of the program since 2012. Eileen joined the program after ten years' experience with social service income support programs in the County. Throughout her career, she has worked with nursing home and assisted living residents to improve their quality of life through her advocacy. National and state organizations seek her participation in stakeholder groups, research studies, protocol reviews, training development, and conference presentations regarding various aspects of long-term care. She is a trained mediator and completed the basic long-term care surveyor training course. She has helped empower long-term care residents to have a presence and speak about their experiences in national forums. She was bestowed the Howard Hinds Memorial Advocacy Award in 2010 by The National Consumer Voice for Quality Long-Term Care.

In her work, she recruits and trains volunteers to become strong advocates, and coordinates the largest

# Presenters' Biographies

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volunteer ombudsman corps in Maryland. She has been active in Maryland's efforts to develop and implement a strategic plan for operational improvement, including providing testimony in the state legislature and federal forums. Gaining national prominence, she is a leader in workgroups for software/data consistency, training development, elder abuse awareness, and volunteer management. She served three terms as Chair of the National Association of Local Long-Term Care Ombudsmen. She currently is the Vice-Chair of the of MD Culture Change Coalition, an encouraging collaborative, focused on implementation of person-centered care practices in long-term care settings . When traveling, Eileen enjoys meeting with local and regional ombudsmen in various areas of the country to learn new ideas and incorporate engaging solutions within the network.

## **Kathy Bradley**

Kathy Bradley is founder, CEO, and Board President of Our Mother's Voice, a nonprofit organization that provides information to empower families to advocate for quality care and services for their loved ones who need long-term care in a nursing home or in their own home. Kathy retired in 2009 after a 33-year career serving people with developmental disabilities in South Carolina, in both facility-based and community-based settings, in capacities ranging from direct care, to program and staff management, to Nursing Home Administrator, to Executive Director of the Kershaw County Board of Disabilities and Special Needs, where she directed lifespan services for people with disabilities throughout the community for 16½ years. In her career she served over 750 people and their families, impacting thousands of lives. She has always been a strong advocate for those she has served. Upon her retirement she assisted both her parents-in-law and her parents in securing services when her father-in-law and her mother suddenly declined into severe dementia. The challenges she confronted in these experiences led her to establish Our Mother's Voice. Kathy is active on a state and national level as well, serving on the SC Adult Protection Coordinating Council; acting as an AARP SC Volunteer Advocate; serving on the National Consumer Voice Leadership Council; participating in numerous committees and work groups; and working with the SC Oral Health Coalition and its Older Adult Work Group. She has presented to diverse groups both locally and nationally with her message of advocacy and well-being for vulnerable people.

## **Heather A. Bruemmer**

Ms. Bruemmer has been the Executive Director/State Ombudsman for the State of Wisconsin Board on Aging and Long-Term Care since January 2008. Previously she was the Program Supervisor for the Ombudsman Program for three years and a Regional Ombudsman for Northeast Wisconsin for five years. She has been with the Board on Aging and Long-Term Care since February 2000.

Heather was appointed by Wisconsin Department of Health Services Secretary Rhoades in 2008 to chair the state's Long-Term Care Advisory Council. This group oversees the expansion of Wisconsin's redesigned long-term care system and its signature element, Family Care. The Council is also responsible for monitoring the quality of Family Care services and Aging Disability Resource Centers in the state. She also actively serves on many statewide committees such as the Restraint Advisory Council, the Prevention Advisory Council, the Statewide Falls Prevention Advisory Council, the Civil Money Penalty State Review Committee and is the Aging Liaison for the Wisconsin Council of Physical Disabilities. Heather is an active member of the National Association of State Long-Term Care Ombudsman Programs.

# Presenters' Biographies

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## Sarah Greene Burger

Sarah Greene Burger has a broad background in implementing initiatives that have had implications for long-term care practice, research and education. As the former Executive Director of The National Citizens' Coalition for Nursing Home Reform (NCCNHR/CV), Ms. Burger helped build a coalition that focused Congressional attention on important consumer issues, such as reducing physical and chemical restraint use and malnutrition and dehydration. In 1997, she brought NCCNHR's consumer minimum staffing standard to a consensus meeting called by the Hartford Institute for Geriatric Nursing, New York University, College of Nursing. This minimum standard with enhancements and confirmed by the Centers for Medicare and Medicaid Services research has now been recommended for nursing homes by the 2004 Institute of Medicine report, "Keeping Patients Safe." Ms. Burger continues to work on developing and implementing policy on a range of issues including nurse aide training, nurse staffing, resident assessment and care planning. She has authored many consumer materials and guides and co-authored two nursing home consumer books.

From 2001 to September 8 of this year 2015, Ms. Burger was the coordinator of the Hartford Institute's Coalition of Geriatric Nursing Organizations (CGNO). The CGNO members include over 28,700 nurses who provide care to older adults and chronically ill individuals in a variety of settings, including nursing homes, assisted living, home care, and hospitals. The CGNO is also the premier geriatric-nursing voice for national policy makers. CGNO nurses are practitioners, administrators, educators, RNs or licensed practical/vocational nurses (LP/VNs), and researchers, including those who have PhDs or are advanced practice registered nurses (APRNs).

Since its inception in 2001, the CGNO has evolved to "put politics and egos aside to commit to a greater good . . . not only to each other but for the specialty that we will leave better than we found it" (AALTN pers. email, 12/22/14). Only that trust and cooperation allows the CGNO to leverage its collective strengths to create a healthcare environment for older adults that is accessible and reflects person-centered care, quality outcomes, and evidence-based practice across all settings. Within that mission, the CGNO works to advocate, educate, and inform for quality and safety for a diverse and aging population in a way that every nurse practices to his or her full scope of practice. The CGNO works with many informal and formal coalitions to achieve these goals.

## Kim Callinan

Kim Callinan serves as the chief program officer (CPO) at Compassion & Choices, the leading national nonprofit organization committed to helping everyone have the best death possible. In this capacity, Ms. Callinan is responsible for working collaboratively with the organizational management team to develop the vision, set the strategic priorities, and direct the design and management of all Compassion & Choices programming. This includes responsibility for a more than 50-person staff and a \$5.25 million departmental budget with oversight for national and federal programs; political and field; legal advocacy and the end of life resource center. Ms. Callinan came to Compass & Choices bringing two decades of experience creating integrated campaigns to engineer social change for government agencies, nonprofit organizations, foundations and political campaigns including supporting issue campaigns related to the uninsured and child health and political campaigns at the federal, state and local levels. Ms. Callinan has a master's degree in public policy from Georgetown University, a graduate certificate in public health from the University of South Florida and a bachelor's degree in government from Oberlin College. She also holds a certificate on the Fundamentals in Gerontology through a joint program offered by The American Society on Aging and the USC Davis School of Gerontology.

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## Brian Capshaw

Brian Capshaw entered Greensprings Healthcare and Rehab in 2008, after developing health issues related to a 1994 automobile accident that left him paralyzed from the chest down. Brian has been a board member of the Statewide Coalition of Presidents of Resident Councils in Connecticut since 2010, and also member of the Leadership Council for the National Consumer Voice for Quality Long-Term Care since 2013. Brian has been Resident Council President of Greensprings since 2010. Prior to entering Greensprings, Brian obtained an MBA from Indiana University and worked 23 plus years in corporate cost accounting for auto manufacturing firms. Brian continues to lobby at the Connecticut legislature for better staffing, as well as increases in the personal needs allowance for nursing home residents.

## Eric Carlson

Eric Carlson is a Directing Attorney at Justice in Aging. Mr. Carlson has over twenty years of experience in long-term services and supports (LTSS), including home and community-based services, nursing facility care, and assisted living facilities. He currently is leading Justice in Aging's research and advocacy around LTSS provided through Medicaid managed care, and a project to advance reform in California's assisted living facilities. Mr. Carlson counsels attorneys from across the country, co-counsels impact litigation that protects LTSS consumers, and is author of the legal treatise Long-Term Care Advocacy.

## Jennifer Carson

As Chief Learning Officer of the Alzheimer's Resource Center, Jennifer's mission is to continually envision and develop opportunities for personal, cultural and systemic growth to improve the well-being of persons living with dementia and their care partners. Jennifer brings a commitment to service, collaboration and innovation built upon 28 years of experience in the field of long-term care and retirement living, bridging direct care and support, organizational leadership, research, innovation, and education. With a strong commitment to partnerships and participatory approaches to both research and practice, Jennifer is an international speaker, university lecturer, published researcher and author regarding long-term care, dementia care and support, culture change, and leisure and aging. Her educational background includes a BA in Therapeutic Recreation from Eastern Washington University (1998) in Cheney, Washington; a MS in Therapeutic Recreation from Clemson University (2003) in Clemson, South Carolina; and a PhD in Aging, Health and Well-Being from the University of Waterloo (2015) in Waterloo, Ontario.

## Josh Casper

Josh Casper is an elder rights attorney in Minnesota. Prior to becoming an attorney, he worked as a regional long-term care ombudsman, in a hospital for the criminally insane, and in violence prevention. He has frequently worked on issues involving neglect, abuse and exploitation. Josh has enjoyed serving on Consumer Voice's Leadership Council for the past two years. He is also a founding member of a long-term care consumer rights organization in Minnesota.

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## Tara Cooke

Tara Cooke is an Outreach Specialist with KEPRO, the Beneficiary and Family Centered Care Quality Improvement Organization (BFCC-QIO). She covers Maryland, Delaware, the District of Columbia, Virginia, and West Virginia. She received her Bachelor of Arts in Communications from Catawba College and her Master of Science in Gerontology from Virginia Commonwealth University. Since the beginning of her career, Tara has advocated for quality care for Medicare beneficiaries. In her role as an Outreach Specialist, she collaborates with stakeholders and providers to ensure the beneficiaries in her area receive quality care by raising awareness about Medicare rights and the role of the BFCC-QIO.

## Jeni Coyne

Jeni has over 28 years of experience in human services working with aging and disability programs. She currently works as a consultant with the National Long-Term Care Ombudsman Resource Center (NORC) and the National Consumer Voice for Quality Long-Term Care. She has worked as an ombudsman at the national, state and regional levels. She started her career as a Regional Ombudsman in Augusta, Georgia; worked as an Ombudsman Specialist for NORC in Washington, DC; then moved back to Georgia to work as an Ombudsman Services Coordinator for the Office of the State Long-Term Care Ombudsman.

Other employment experience includes managing the Access to Services Section in the Georgia Department of Human Services Division of Aging Services, administrator of a 40 bed Assisted Living Facility, Elder Rights Coordinator for the CSRA Area Agency on Aging, and Victim Advocate for the Rape Crisis Center in Savannah, Georgia.

Jeni serves on the Board of Trustees for ESOP (Empowering and Strengthening Ohio's People). ESOP's mission is "to foster the economic empowerment of disenfranchised communities through outreach, education and advocacy." She also volunteers weekly at the Lakewood Community Services Center where she assists clients with obtaining emergency food assistance and completing benefits applications.

## Sherry Culp

Sherry Culp is the Kentucky State Long-Term Care Ombudsman. Sherry administers the Kentucky State Long-Term Care Ombudsman Program from the Nursing Home Ombudsman Agency of the Bluegrass, Inc. (NHOA) a freestanding nonprofit agency located in Lexington, Kentucky that focuses on improving care for residents of long-term care facilities through services provided by the Long-Term Care Ombudsman Program.

In September 2014, the Commonwealth of Kentucky contracted with NHOA to perform the functions of the Office of the State Long-Term Care Ombudsman. Sherry is the leader of the Long-Term Care Ombudsman Program in Kentucky where she works with 15 local District Ombudsman Programs, consumers and other advocates to promote quality care. Sherry provides training and coaching to ombudsmen and educates the public about problems residents experience and how to resolve them.

Before becoming an ombudsman Sherry was a social worker with Lexington's Department of Social Services

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where she provided social work services to senior citizens Sherry began as a volunteer ombudsman at the Nursing Home Ombudsman Agency in 1996 and became the agency's Director of Program and Services in 1999. In 2009 Sherry became the Executive Director of the agency and the local Bluegrass District Ombudsman. Sherry recruited, trained, and managed 30 certified ombudsman staff and numerous volunteers while leading the local program.

Sherry has a Master's degree in social work (MSW) from the University of Kentucky. She is a former member of the Board of Directors of the Consumer Voice, was an officer of the National Association of Local Long-Term Care Ombudsmen and mentor for many new ombudsmen. Sherry has given hundreds of presentations and provided training across the country to ombudsmen, nurses, social workers, the general public, as well as residents and their families on topics ranging from navigating the long-term care system to abuse prevention.

## **Patty Ducayet**

Patty Ducayet is a Licensed Master Social Worker. She became the State Long-Term Care Ombudsman at the Department of Aging and Disability Services (DADS) in January 2007. As the State Long-Term Care Ombudsman, Patty oversees 28 local ombudsman programs, certifies and trains ombudsmen, and advocates for policy and legislative change to positively impact Texans living in nursing homes and assisted living.

Prior to her work at DADS, Patty worked for The Senior Source, a nonprofit organization in Dallas. Ms. Ducayet served as managing local ombudsman for the Dallas County program for three years, followed by serving as Director of Programs for eight aging services including Ombudsman, Guardianship and Money Management, RSVP, Senior Companions, Foster Grandparents, Senior Employment, Advocacy Group for Elders, and In-home Elder Support.

Patty holds a bachelor's degree in social work from the University of Texas (1995) and a master's degree in social work from the University of Denver (1999). She is specially trained in conflict resolution. She has served on the board of the National Association of State Long-Term Care Ombudsman Programs since 2009 and currently serves as President.

## **Toby Edelman**

Toby S. Edelman has been representing older people in long-term care facilities since 1977. As a Senior Policy Attorney with the Center for Medicare Advocacy since January 2000, Ms. Edelman provides training, research, policy analysis, consultation, and litigation support relating to nursing homes and other long-term care facilities. Under two grants from the Commonwealth Fund, she evaluated the federal nursing home survey and enforcement system and its impact on state activities and provided technical assistance to states on effective enforcement practices. In cooperation with the Centers for Medicare & Medicaid Services, she recently completed a Commonwealth Fund project to evaluate seven states' deficiency citations for misuse of antipsychotic drugs. Since September 1999, she has written a monthly newsletter on nursing home enforcement issues. Ms. Edelman was the lead attorney for a statewide class of nursing facility residents who successfully challenged the state of California's refusal to implement the federal Nursing Home Reform Law (*Valdivia v. California Department of Health Services*, Civ. No. S-90-1226 EJG (E.D. Calif. 1993)). As a beneficiary

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representative, Ms. Edelman has testified before Congress and served on federal task forces, technical expert panels, and working groups on nursing home issues. Ms. Edelman received a B.A., magna cum laude, from Barnard College (1968), an Ed.M. from the Harvard Graduate School of Education (1969), and a J.D. from the Georgetown University Law Center (1974).

## Pamela Edgar

Pamela Edgar is a Licensed Creative Arts Therapist and Certified Dementia Practitioner with over eight years of experience working with seniors and their families. In her current role as End-of-Life Care Manager with Compassion & Choices, Pam has provided end-of-life consultation and support to hundreds of clients and families. She earned her Master of Arts in Drama Therapy from New York University, trained as an end-of-life doula, and has completed the Respecting Choices: Advance Care Planning facilitator and instructor certification program through Gundersen Medical Foundation. As the inaugural Director of Dementia Services for a nursing home in Brooklyn, NY, Pam developed and facilitated dementia training programs for interdisciplinary staff and support programs for families, and helped integrate a hospice program throughout the facility. Ms. Edgar has presented workshops, lectures and trainings to over a dozen academic institutions and professional organizations, including New York University, Hunter College, National Association of Social Workers and the American Society on Aging.

## Cindy Eggleston

Cindy Eggleston is a Registered Nurse and Regional Director of Health and Wellness for Brightview Senior Living. She supports five Brightview communities in the MD/VA Region, and four additional communities in the region are scheduled to open in 2016. Her past experience includes 8 years as Sunrise Senior Living's Regional Director of Resident Care in the VA/MD/DC region and 5 years as the Health Care Coordinator at Sunrise of CountrySide in Sterling, VA. Ms. Eggleston also has been a Visiting Nurse for the Visiting Nurses Association of Virginia and a Staff Nurse at Virginia Hospital Center.

## Vicki Elting

Vicki Elting joined the King County LTCOP (serving Seattle Metro area) in 1991 after years spent as a student, Medical Technologist, mom, and teacher. In 2001 she left the post and lived in Colorado and California serving as a local volunteer ombuds in Denver and Napa, returning to the Regional Long-Term Care Ombuds post in Seattle in 2005-2012. In 2012, Ms. Elting became the Assistant State Long-Term Care Ombuds providing technical support to thirteen local ombudsman programs. Ms. Elting holds a BS degree in Biology from California State University, Northridge and a Washington State and California State K-12 Teaching Credential. She enjoys scuba diving and continuing education offered by her grandson, Miles, age 9.

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## Jonathan Evans

Jonathan Evans MD, MPH, CMD is Past-President of AMDA – The Society for Post-Acute and Long-Term Care Medicine. Jonathan graduated from Mayo Medical School in 1989. He completed Internal Medicine Residency training and Geriatric Medicine training at Mayo and from 1994 to 2000 was a staff physician and Associate Professor of Medicine at Mayo Clinic until 2000. In 2000, he received a Bush Medical Fellows award and pursued a Masters of Public Health degree at the University of Minnesota. He is board certified in Internal Medicine, Geriatric Medicine, and Hospice and Palliative Medicine. From 2001 to 2009, Dr. Evans was Head of Geriatric and Palliative Medicine and the Geriatric Medicine Fellowship Training Program director at the University of Virginia. In 2009, he was full-time long-term care physician in Charlottesville, Virginia, and in 2012 was appointed Corporate Medical Director for Life Care Centers of America in 2012 directing the programs, policies and personnel of the clinical services department of Life Care and its support of all facilities.

## Barbara Frank

Barbara started her career working side by side with Elma and Sarah for 16 years at the National Citizens' Coalition for Nursing Home Reform in Washington, DC. She helped establish the national network of state and local ombudsman programs and later served for 4 years as Connecticut's State Long-Term Care Ombudsman. At NCCNHR, Barbara directed the 1985 study, *A Consumer Perspective on Quality Care: The Residents' Point of View*. She facilitated the Campaign for Quality Care, which developed the consensus for OBRA 1987, the Nursing Home Reform Law. Barbara facilitated the first Pioneer Network gathering in 1997, and in 2005 she facilitated the St. Louis Accord, a national gathering of providers, consumers, regulators, and quality improvement organizations that came together to improve clinical outcomes through staff stability and culture change.

Barbara co-founded B&F Consulting with Cathie Brady, and together, they help nursing homes be better places to live and work. They often serve as faculty for learning collaboratives to improve staff stability, care outcomes, quality of life, and overall organizational performance. They have co-produced a Staff Stability Toolkit and the four part CMS web series "From Institutional to Individualized Care." They led a team in the New Orleans Nursing Home Staffing Project, which helped nursing homes recover from the aftermath of Hurricane Katrina, and co-produced a film with Louisiana Public Broadcasting called *The Big Uneasy: Katrina's Unsung Heroes*. They developed "Ten Steps to Eliminating Off-Label Use of Antipsychotics for Louisiana's Partnership to Improve Dementia Care," and are part of a team safely reducing avoidable hospitalizations in Alabama under a CMS Innovations Project. With David Farrell, they co-authored *Meeting the Leadership Challenge in Long-Term Care: What You Do Matters* (Health Professions Press 2011) and with Sarah Burger, Virginia Fraser, and Sara Hunt, Barbara co-authored *Nursing Homes: Getting Good Care There* (Impact Publisher 1996).

## Iris Freeman

Iris Freeman, MSW, is an Adjunct Professor of Elder Justice and Policy at the William Mitchell College of Law. Her Elder Justice Externship course combines a classroom seminar with legal research placements in organizations and public agencies whose purpose includes the care and rights of the elderly. Her current and recent research focuses on effective interventions in financial exploitation. She chairs the Board of the Minnesota Elder Justice Center whose mission is to advance public awareness, professional education and system reforms by building

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broad consensus. Ms. Freeman directed the Advocacy Center for Long-Term Care for over 20 years and was Director of Public Policy at the Alzheimer's Association, Minnesota-Dakotas Chapter from 2000-2003.

## Iris Gonzalez

Iris Gonzalez is a Senior Attorney at AARP Foundation Litigation (AFL) and specializes in civil rights and health law, with an emphasis on litigation. Iris is co-counsel in *Thorpe v District of Columbia*, (Case No. 10-02250)(U.S.D.D.C.), a lawsuit under the ADA Title II on behalf of nursing facility residents seeking assistance in transitioning to the community. Iris was also co-counsel for a class of California nursing facility residents in *Levine v Ventura Convalescent Hospital* who were administered psychotropic medications without informed consent. Iris is preparing a lawsuit in New Mexico regarding the wrongful death of a nursing facility resident suffering from dementia who was inappropriately given powerful antipsychotic drugs just days before his death. Iris has been part of AFL's Health Team since 2013. Prior to joining AFL, Iris was a Senior Associate at Covington & Burling LLP, where she specialized in complex litigation matters in the pharmaceutical and medical device fields, among other areas. While at Covington, Iris was pro bono counsel for Plaintiffs in the *Dixon v. Gray*, (No. 1:74-cv-00285) (U.S.D.D.C.), a class action brought to redress the unnecessary institutionalization of DC residents with serious mental illnesses. As class counsel, Iris oversaw the continued implementation of a consent decree and ultimately settled the case after 35 years of litigation and court monitoring. Iris is a member of the National Consumer Voice Board of Directors.

## Yvette Green

Yvette Green is a resident of a long-term care facility in Philadelphia. She lives at Inglis House, which is a residential wheelchair community serving people with long-term disabilities. Yvette is also a volunteer assistant ombudsman in the facility; she was previously in a nursing home for 3 years and has been living in her current residence for 10 years. Since there, she has completed a college degree.

## Patricia Hagen

Patricia Hagen has a Bachelor's Degree in Recreation Therapy from the University of Maryland, and an MBA/MHA from Pfeiffer University. She has been the Director of Memory Care at the Charles E. Smith Life Community in Rockville, MD, since 2012. In that role, she provides education and training in care approaches to the care team as they work with individuals living with dementia on the Charles E. Smith Life Community Campus. She also educates family members about dementia. Her career has spanned more than 20 years, with 15 of those in Long-Term Care. She currently serves as the chairperson of the Maryland Culture Change Coalition.

## Melissa L. Harris

Melissa Harris has been with the Centers for Medicare & Medicaid Services (CMS) since the summer of 1995, and has served as the Director of the Division of Benefits and Coverage since 2012. She is responsible for overseeing implementation of most Medicaid benefits, including benefits provided to individuals in the Medicaid expansion

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population, and the establishment of national benefit policy. Starting in January 2015, she is the Acting Deputy Director for the Disabled and Elderly Health Programs Group, focusing on Medicaid benefit provision, delivery system issues, and Home and Community Based Services (HCBS) regulation implementation. Prior to her current position, Melissa worked on a variety of programs serving the nation's elders and individuals living with a disability. With a focus on community-based alternatives to institutional placement, Melissa worked for more than 10 years on the Program of All-inclusive Care for the Elderly (PACE), along with other topics such as home health, targeted case management, and hospice care. Before becoming Director of her current Division, she was also Technical Director, and later Deputy Director. In 2003, Melissa was fortunate to participate in a three-month job-sharing opportunity with Children's Hospice International, a non-profit organization promoting coordinated and holistic care for children with life-threatening conditions and their families.

## Catherine Hawes

Catherine Hawes, Ph.D., is a Regents Professor, Emeritus, School of Public Health at Texas A&M University. Before that, she was on the faculty at Duke University and formerly Director of the Program on Aging and Long-Term Care at Research Triangle Institute. During her career she led more than 30 research projects, mainly for the federal government and national foundations. She led a number of significant projects, including the team that developed the "MDS" that is used to assess and plan the care of all US nursing home residents; the effect of regulation on quality in residential care/board and care homes; the first National Study of Assisted Living for the Frail Elderly; a project to determine the feasibility of developing prevalence estimates of elder abuse in nursing homes; and a study of how states detect, investigate and prevent elder abuse in assisted living and other residential care facilities. Most recently she participated in an "exploratory" examination of unlicensed personal care homes. She served on a number of national panels, including the Institute of Medicine's Committee that recommended the current federal regulations for nursing homes. She testified before the US Senate eight times as an expert witness and recently appeared on the PBS Frontline/Pro Publica Special on "Life and Death in Assisted Living." She received the Elma Holder Founder's Award from the National Consumer Voice, a lifetime achievement award for her contribution to improving the quality of long-term care.

## Alice Hedt

Since 2010, Alice H. Hedt has been the State Long-Term Care Ombudsman for Maryland, responsible for administering the statewide Ombudsman Program including providing direction, training, monitoring, and evaluation of the local components of the Program administered by the Area Agencies on Aging. Under her leadership, all ombudsmen now complete a rigorous certification process and volunteer involvement has expanded throughout the state. Ms. Hedt has more than 34 years experience in aging and long-term care issues, including starting the first regional ombudsman program to serve the eight county area around Charlotte, North Carolina, and heading for six years the National Long-Term Care Ombudsman Resource Center funded by the federal Administration on Community Living. For five years, she led NCCNHR: The National Citizens' Coalition for Nursing Home Reform in its efforts to provide information and leadership on policy development and strategies for improving care for residents of nursing homes and other long-term care facilities. Currently Ms. Hedt serves as the co-chair of Maryland's Alzheimer's Council, is a member of the Nursing Home Board of Examiners, and was a founding member of Maryland's new Culture Change Coalition.

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## Alison Hirschel

Alison Hirschel is the Director of the Michigan Elder Justice Initiative and the elder law specialist at the Michigan Poverty Law Program. She focuses on issues that affect low income older adults and people with disabilities including health care, long-term care, elder abuse, and public benefits. Since 1998, she has also taught elder law at the University of Michigan Law School. Previously, Alison worked at Michigan Protection and Advocacy and Community Legal Services in Philadelphia, PA. Alison is counsel to the State Long-Term Care Ombudsman Program and oversees two local ombudsman programs. She is also the past president of The Consumer Voice in Washington, D.C. and served as a Commissioner on the American Bar Association Commission on Law and Aging. Alison received her B.A. in 1981 from the University of Michigan and her J.D. in 1984 from Yale Law School.

## Elma Holder

In 1975, Elma was the primary founder of the National Citizens' Coalition for Nursing Home Reform (current Consumer Voice). She later served as Executive Director and Board member from 1977 to 1995. Her first activity in the nursing home field was at the Oklahoma State Health Department after achieving an MS degree in Public Health from the University of Oklahoma. After moving to Washington, D.C. in 1970, she worked for the National Council on Aging and Ralph Nader's Retired Professional Action Group. NCCNHR was formed while Elma worked in Philadelphia with Maggie Kuhn and the National Gray Panthers where Holder was co-author of *Nursing Homes a Citizens Action Manual*.

After moving back to DC, Elma obtained the first grants which bolstered the growth of NCCNHR. First, in 1977 the Administration on Aging granted resources to conduct the first national ombudsman training. The second grant was awarded by the National VISTA program for training and placing VISTA volunteers to work in several of our member groups. A third grant from AoA established and supported our National Clearinghouse. In the early 80's, Elma initiated the first of a series of grants awarded by the Retirement Research Foundation.

Through her work with NCCNHR staff, the board and our members, in 1999 Elma received an award from the National Academy of Sciences, Institute of Medicine "for bringing the needs of an unserved, often neglected and abused nursing home population to high national awareness." In 2006, the Heinz Foundation presented her with the Chairman's Medal for leadership in the nursing home field. Holder was among a group of people chosen by AARP in 2013 as "10 Champions of Aging." According to AARP, these leaders helped build a nation that respects and protects its older citizens. This summer, she was chosen as a delegate to the 2015 White House Conference on Aging.

Currently, Elma lives in Oklahoma and is working on a book about the history of NCCNHR and of nursing home reform, highlighting our leadership work to achieve the National Nursing Home Reform Law of 1987.

## Patricia Hunter

With over 28 years of experience in the field of aging, Patricia Hunter has served as the Washington State Long-Term Care Ombuds since 2011. The mission of the Long-Term Care Ombudsman Program is to ensure the

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rights, dignity and well-being of individuals who live in long-term care settings. Ms. Hunter oversees the work of staff and volunteer ombudsmen across the state, including the investigation and resolution of complaints filed by, or on behalf of, long-term care residents. As the State Ombuds, Ms. Hunter also works on systemic issues with consumers, state agencies, and legislators to improve the quality of care and life for individuals living in Long-Term Care settings. Prior to becoming the State Ombuds, Ms. Hunter worked for the Alzheimer's Association, Western and Central WA State, serving in a variety of positions, including Director of Programs and Policy and Interim Executive Director. Ms. Hunter is a graduate of Central Washington State University's School of Business Administration, and holds a Master's in Social Work with an emphasis in Health and Mental Health, from the University of Washington. She is also a graduate of Leadership Tomorrow, Class of 2008.

## Morris Kaplan

Morris Kaplan is an attorney and recognized expert in nursing home best care practices and dementia care. He developed and oversees all programs at the 181-resident Gwynedd Square Nursing Center just outside of Philadelphia. Gwynedd Square has consistently been honored as a US News & World Report Best Nursing Home and is consistently awarded the highest rating, 5 Stars, by the federal government. Gwynedd Square has for over two decades earned among the best quality measure ratings in the state and country in areas including skin ulcers, weight loss, antipsychotic use, loss of bowel/bladder, etc. Mr. Kaplan has been an expert and presenter for the Centers for Medicare and Medicaid Services ("CMS", US Dept. of Health & Human Services) on topics including nursing home and dementia care best practices and has been a major contributor to CMS's National Partnership to Improve Dementia Care & Reduce the Use of Antipsychotics.

Mr. Kaplan has made training videos for CMS and has participated as a presenter in numerous CMS Webcasts and national phone conferences. He has authored several articles and recently was a contributing author to the third edition of "What If It's Not Alzheimer's? A Caregiver's Guide To Dementia" edited by Radin, Prometheus Books 2014. Mr. Kaplan has been a presenter for many years at various nursing home consumer organization conferences and attorney organization conferences.

## Naomi Karp

Naomi Karp, J.D., is Senior Policy Analyst at the Consumer Financial Protection Bureau's Office for Older Americans. She focuses on elder financial exploitation and the impact of diminished decision-making capacity on financial security. From 2005 to 2011 at AARP's Public Policy Institute, Karp conducted research and advocacy on elder financial exploitation, advance planning for incapacity, health care decision-making, powers of attorney, guardianship, and legal rights. From 1988-2005, she served on the staff of the ABA Commission on Law and Aging, and previously was a legal services attorney.

## Becky A. Kurtz

Since July 2010, Becky Kurtz has been the Director of the Office of Long-Term Care Ombudsman Programs within the US Administration on Aging (part of the Administration for Community Living, Department of Health and Human Services). In this capacity, she promotes effective State Long-Term Care Ombudsman Programs

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that resolve concerns with and for our nation's long-term care facility residents. She also advocates for long-term care facility resident interests at the national level.

Becky was Georgia's State Long-Term Care Ombudsman for 16 years. During that time, she served in various leadership roles in NASOP (the National Association of State Long-Term Care Ombudsman Programs), serving as its president from 2004-2006. Prior to her ombudsman work, Becky 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, Becky is a 1984 graduate of Emory & Henry College (Emory, Virginia) and a 1988 graduate of Columbia University School of Law.

## Nancy Kusmaul

Nancy Kusmaul has an MSW from the University of Michigan with a Specialist in Aging Certificate, and a PhD in Social Welfare from the University at Buffalo. Dr. Kusmaul was a practicing social worker for more than a decade, in nursing homes, hospitals, home care, and adult day care. She then pursued her PhD, where her research has focused on nursing home quality of life and direct caregivers. She has focused on the experience of the Certified Nursing Assistant within the nursing home environment, including a grant from the UUP of New York State to do qualitative interviews on CNA perceptions of good care. She has looked at the experience of family caregivers and the family/staff interaction at end of life. She has also been part of a team that evaluated the infusion of trauma informed care in human service agencies of all types. She has published 6 peer-reviewed articles and multiple conference presentations. Dr. Kusmaul was in the first cohort of the AGE-SW pre-dissertation initiative. She is a member of the National Association of Social Workers, the Gerontological Society of America, and the Association for Gerontology Education in Social Work (AGE-SW). She is also active locally, on the Baltimore County Elder Abuse Coalition and the Maryland (Nursing Home) Culture Change Coalition.

## Dean Lerner

Dean Lerner, J.D. served as an attorney consultant to Alice Bonner, Director, Nursing Home Division, Survey and Certification Group, CMS, on nursing home issues. From 2007-11, he was a cabinet level gubernatorial appointee, Director of the Iowa Department of Inspections & Appeals. Among many other responsibilities, this Senate confirmation appointment included oversight of the State Survey Agency. From 2002-2007, he was the Deputy Director of this Department and, before that, served as Iowa's Chief Deputy Secretary of State. Mr. Lerner also served for 16 years as an Iowa Assistant Attorney General, prosecuting and defending cases on behalf of the State of Iowa. He is also an accomplished journalist, served as co-investigator for "The Commonwealth Fund: Examining Inappropriate Use of Antipsychotic Drugs," and assisted in drafting Hand in Hand. He served as an Attorney Consultant on special assignment with Disability Rights Iowa (formerly Iowa Protection and Advocacy) regarding Iowa PASRR, and currently serves as a Health Care Fraud Consultant to the United States Attorney for the Northern District of Iowa.

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## Brian Lindberg

Brian Lindberg has served as the Executive Director of the Consumer Coalition for Quality Health Care since 1993. He also formed and still coordinates the Campaign to End Unwanted Medical Treatment. Mr. Lindberg provides public policy consultation for The Gerontological Society of America, the National Association of State Long-Term Care Ombudsman Programs, the National Association for Geriatric Education, the National Guardianship Association, the Special Needs Alliance, the Women's Institute for a Secure Retirement, Compassion & Choices, and the Elder Justice Coalition. Mr. Lindberg served on the Planning Committee for the National Quality Forum (appointed by Vice President Gore). He has also served on its Board of Directors and as Chair of its Consumer Council. He represents consumer viewpoints on various panels, including the Joint Commission, the Institute of Medicine, and the National Committee for Quality Assurance. He was a member of the CMS Advisory Panel on Medicare Education, and a funded consumer representative on the National Association of Insurance Commissioners. Currently, Mr. Lindberg serves on the Board of Visitors of the College of Health Professions and Social Work, Temple University. Mr. Lindberg worked in Congress for ten years on the House Select Committee on Aging and the Senate Special Committee on Aging. He holds a Bachelor of Social Work degree from Temple University, a Master's degree in Management of Human Services from Brandeis University, and studied social and health care policy at the University of Stockholm's International Graduate School.

## Mitzi McFatrach

Mitzi McFatrach is Executive Director of Kansas Advocates for Better Care. In that role, she provides leadership on public policy advocacy to improve long-term care for/with Kansans, leadership for individual consumer advocacy, develops consumer resources and guides, and trains professional and lay caregivers on best care practices. She is Vice Chair of the Consumer Voice Leadership Council.

## Pamela Meador

Pamela Meador, RN, BSN-BC began her career in Skilled Nursing back in 1991 as an RN charge nurse on a Subacute unit in Beckley, WV. Over her 20 year service with the same company, she enjoyed many positions such as MDS coordinator, Assistant Director of Nursing, Staff Development Coordinator and Director of Nursing. In 1998, she became certified in Gerontology through the American Nurse Credentialing Center and received her BSN through West Virginia University. She has been with West Virginia Medical Institute as the RN Project Coordinator for Long-Term Care since 2010. She has a true love of long-term care and believes the residents we serve deserve our constant commitment to continuous quality improvement.

## 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. CARIE is a multi-service advocacy organization, founded in 1977, assisting frail older adults and their caregivers, advocating for policy changes and providing training and education to improve their quality of life. 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

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consulted with the PA Department of Education and the Health Care Financing Administration (now Center for Medicare and Medicaid Services) 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 and is currently a member of the Advisory Council for Elder Justice in the Courts sponsored by the PA Supreme Court. 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.

## Richard Mollot

Richard Mollot is the executive director of the Long Term Care Community Coalition (LTCCC), a nonprofit organization dedicated to improving care for seniors and the disabled through legal and policy research, advocacy and education. Richard has served on a number of state and national consumer and government advisory groups relating to such issues as: dementia care; nursing home and assisted living standards; mandatory managed long-term care; and nursing home financing and quality improvement.

Richard has written and presented trainings on a variety of Long-Term Care issues, including: *Residential Care in the United States: A Persistent Struggle for Quality, Dignity & Independence*; *Safeguarding Nursing Home Residents & Program Integrity: A National Review of State Survey Agency Performance*; *Assisted Living Law & Policy*; *Federal Requirements Regarding Dementia Care & Antipsychotic Drugs*; *Caring & Planning for an Aging Person With Disabilities*; and *Informed Consent Rights in U.S. Nursing Homes: An Overview of State & Federal Requirements*. He is a graduate of Howard University School of Law and a member of the Maryland Bar.

## Joe Musso

Joe Musso is a partner at Ashcraft & Gerel in Alexandria, VA. Mr. Musso has been an elder abuse and neglect attorney for the past 17 years. He has handled hundreds of neglect claims in dozens of jurisdictions. He is licensed to practice law in NJ, PA, DC, MD and VA and is often admitted pro hac vice around the country. He is a member of the AAJ Nursing Home Litigation Group where he routinely speaks throughout the country on issues involving nursing home litigation. A trained life coach and writer, Mr. Musso also coaches caregivers on his "Empowered Caregivers" program which is designed to educate individuals caring for loved ones in institutionalized settings.

## Victoria Nugent

Victoria Nugent, a Partner at the Firm, joined Cohen Milstein in 2000 and is a member of the Public Client practice group.

Ms. Nugent has focused on consumer protection and public health litigation throughout her career. Past cases include In re StarLink Product Liability Litigation, in which she represented farmers suing Aventis CropScience

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after an unapproved variety of genetically modified corn was detected in the U.S. corn supply and drove down prices for all U.S. corn exports. More than \$100 million was recovered for the class in a landmark settlement. In 2009 and 2010, Ms. Nugent filed suit on behalf of consumers challenging the post-transaction marketing practices of Internet giants Intelius and McAfee, persuading federal courts in California and Washington that these practices run afoul of state consumer protection laws. Ms. Nugent has argued cases before the high courts of Georgia, Nebraska and the District of Columbia, as well as the federal D.C. Circuit Court of Appeals.

Since November 2011, Ms. Nugent has been working on behalf of various states in the Firm's Public Client Practice Group. Before joining Cohen Milstein, Ms. Nugent worked for seven years at Public Citizen, a national consumer advocacy organization. During that time, she worked on many legislative and regulatory campaigns addressing issues that ranged from automobile safety to international trade policy. In 1998, Ms. Nugent received a two-year fellowship sponsored by the National Association for Public Interest Law (NAPIL). As a NAPIL Fellow, she worked at Trial Lawyers for Public Justice (TLPJ), where she helped develop and prosecute impact litigation in the areas of arbitration, banking, credit and insurance.

## Addie O'Connell

Addie O'Connell retired from the U.S. Department of State after a 30 year career working in international student and scholar exchange programs. Following that, she spent a decade in marketing and meeting planning for a national association of physicians. She volunteered in earlier years in programs for the visually handicapped and hospice.

Addie's interest in long-term care stems from being a caregiver for several family members. The maze of long-term care led her to become a Volunteer Ombudsman and she later worked briefly in the Northern Virginia Long-Term Care Ombudsman Program.

Now fully retired, Addie is a responsible party for a friend who is in a nursing home. With that connection, she helped build the Arleigh Burke Pavilion – Family Council (ABP-FC) which started in 2012. This group has become a vital link in promoting quality care for all ABP residents and strives to maintain a constructive and positive partnership with the facility's leadership and staff. The ABP-FC received a 2014 grant from the Edward H. Lane Memorial Foundation.

## Gwen Orłowski

Gwen Orłowski currently practices health law at Central Jersey Legal Services. She has years of experience in direct representation and policy in the area of Medicaid and managed long-term service and supports. Prior to coming to CJLS in May 2015, Gwen was a senior staff attorney at Justice in Aging (formerly the National Senior Citizens Law Center). She also had worked on aging and healthcare issues at Legal Services of New Jersey, and the New Jersey Public Advocate, where she served as the Director of Elder Advocacy and the state long-term care Ombudsman. Gwen is a graduate of Georgetown University and Rutgers-Newark School of Law.

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## Nancy K. Overstreet

Nancy Overstreet DNP, GNP-BC, CWOCN, CDP is a Geriatric Nurse Practitioner with over 30 years of nursing experience. Her baccalaureate degree in nursing is from the University of North Carolina – Chapel Hill, Master's degree from Virginia Commonwealth University and her post-master's and doctoral degrees are from the University of Virginia.

Along with maintaining a clinical practice in a variety of long-term care settings, Dr. Overstreet enjoys teaching students in both undergraduate and graduate nursing programs. Currently serving as the Lead Educational Nurse Consultant for the Society for Post-Acute and Long-term Care Medicine (AMDA) 's Younger Adults in Long-term Care Settings Education project, Dr. Overstreet is delighted to be here to share information about AMDA's new training curriculum to help meet the needs of younger nursing home residents.

## Peter Reed

Dr. Peter Reed serves as Director of the Sanford Center for Aging and Professor of Community Health Sciences at the University of Nevada, Reno. As a statewide aging center that is part of the UNR Division of Health Sciences, the Sanford Center's mission is to enhance quality of life and well-being among elders through translational research, education and community outreach. Dr. Reed brings to the Center a commitment to service and collaboration, built upon 20 years of experience in the field of aging that bridges research, practice, policy, and organizational leadership. Dr. Reed received both a PhD and MPH in Health Behavior and Health Education from the School of Public Health at the University of North Carolina at Chapel Hill, where he was a National Institute on Aging Pre-Doctoral Fellow in the Carolina Program on Healthcare and Aging Research. He is also a Phi Beta Kappa-graduate of the University of Kentucky, receiving a Bachelor of Science in Sociology. Previous appointments include serving as CEO of Pioneer Network, President and CEO of the Center for Health Improvement, and as Senior Director of Programs for the Alzheimer's Association National Office. He is active with numerous boards and commissions, currently serving on the Governing Board of Consumer Voice, the Board of Directors for the Alzheimer's Association of Northern California and Northern Nevada, the Board of Directors for Nevada POLST, and as Vice-Chair of the Nevada Task Force on Alzheimer's disease.

## Joseph Rodrigues

Joseph Rodrigues has been the California State Long-Term Care Ombudsman since August 2002. As the State Long-Term Care Ombudsman, Mr. Rodrigues oversees 35 local Ombudsman programs, with approximately 1,000 certified Ombudsmen who have a regular presence in approximately 1,300 skilled nursing facilities and almost 7,600 residential care facilities for the elderly. Prior to his appointment as State Long-Term Care Ombudsman, Mr. Rodrigues was the Assistant Director of the Alameda County Area Agency on Aging. Before working for the County of Alameda, Rodrigues was the Executive Director of St. Peter's Community Adult Day Care Center, the first licensed Adult Day Support Center in the county. Rodrigues is on the faculty of Gerontology Program of the California State University, Sacramento. Mr. Rodrigues is the immediate Past President of the National Association of State Long-Term Care Ombudsman Programs and is on the Board of Directors of the National Committee for the Prevention of Elder Abuse, the California Council on Gerontology and Geriatrics, and the

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California Culture Change Coalition. He is a member of the American Society on Aging and Sigma Phi Omega, the national academic honor and professional society in gerontology. Rodrigues earned a Bachelor of Arts degree in Philosophy from St. Patrick's College in Mountain View, California and a Master of Divinity degree from their graduate school in Menlo Park, California. He also holds a Lifetime Instructor Credential from the California Community College system.

## Cynthia Rudder

Cynthia Rudder, Ph.D. held the position of executive director of the Long Term Care Community Coalition (formerly the Nursing Home Community Coalition of New York State), for over 35 years. She is now semi-retired and a consultant for a number of different not-for-profit organizations.

Dr. Rudder has received a number of awards for her research and advocacy, including a Lifetime Achievement Award from CMS in April, 2013. Among her other awards are: New York State Office for the Aging: Director's Distinguished Achievement in Aging Award for Advocacy and Protecting the Rights of the Elderly, May, 2010; Paul Dana Vanas Memorial Award for Commitment to Excellence on Behalf of Long-Term Care Residents, October 18, 2007. NYS Long-Term Care Ombudsman Program; Elma Holder Founders' Award for a Lifetime Achievement in Long-Term Care Advocacy, October 2005; Senior Advocacy Award. Awarded by New York StateWide Senior Action Council, September 1995; Distinguished Service Award for Outstanding Advocacy and Commitment to Long-Term Care Residents. Awarded by New York Association of Long-Term Care Ombudsman Programs, 1995; Advocacy Memorial Award for Outstanding Advocacy for Residents of Long-Term Care Facilities. Awarded by the National Citizens Coalition for Nursing Home Reform, October, 1995; and Health Care Financing Administration Citation for advocacy for Medicaid/Medicare beneficiaries – 1994.

She has been a member of many advisory groups including: Board of Examiners for NYS Nursing Home Administrators – continuing; Leadership Council of The National Consumer Voice; New York State Task Force on Nursing Home Reimbursement – continuing; New York State Task Force on Adult Homes and Assisted Living Residences – continuing; New York State's QIO's Nursing Home Improvement's Steering Committee; CMS (HCFA) Advisory Committee –Medicare Demonstration Project, RUGs III; New York State Department of Health's Dementia Advisory/Work Group Committee; and New York State Department of Health's Best Practices in the Nursing Home Steering Committee.

With grants from numerous foundations and governments, she has published a number of reports and articles on nursing home and assisted living including: "Waiting to Go Home...Waiting to Be Asked," (2015); "Consumer Participation in Nursing Home Medicaid Reimbursement Policy Making," (2012); "Care and Oversight of Assisted Living," (2011); "Oversight of Nursing Home Care," (2010); "Modifying the Nursing Home Reimbursement System to Encourage Access, Quality and Efficiency," (2009); "Variation in the Use of Federal and State Civil Money Penalties for Nursing Homes," *The Gerontologist* 48, No. 5, 679–691 (2008) With Charlene Harrington, PhD, Theodore Tsoukalas, PhD, Richard J. Mollot, JD, and Helen Carrillo, MS.; and "The Collection and Use of Funds From Civil Money Penalties and Fines From Nursing Homes," *The Gerontologist* 46:759-771 (2006). With Theodore Tsoukalas, Richard Mollot, Meghan Shineman, Hyang Yuol Lee and Charlene Harrington. Dr. Rudder received a B.S., from Queens College (1963), an MS. from the Queens College (1966), and a Ph.D. from New York University (1972).

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## Louise Ryan

Louise currently serves as Ombudsman Program Specialist for the U.S. Administration for Community Living/ Administration on Aging. Her primary duties include providing technical assistance to states on policy interpretation of the Older American's Act as it relates to the operations of Long-Term Care Ombudsman Programs. She also is the lead in overseeing all aspects of Long-Term Care Ombudsman data collection and reporting. Prior to coming to AoA Louise was the Washington State Long-Term Care Ombudsman for nearly five years after having served as the Assistant State Long-Term Care Ombudsman for nine years. She had responsibility for the statewide Long-Term Care Ombudsman Program, all its staff and contractors including a corps of four hundred certified volunteer ombudsmen. Her previous work focused on ombudsman program management and promoting systems advocacy by working with state agencies and with the legislature to promote services and supports to promote rights and consumer protections and to improve the quality of care and life for persons living in long-term care facilities.

## Karen C. Schoeneman

Karen C. Schoeneman is currently the owner of Karen Schoeneman Consulting LLC, providing education and consulting in Quality of Life, Culture Change, and Regulatory Affairs. She retired in 2012 from a 22 year career in the CMS Division of Nursing Homes, which has responsibility for survey and certification of all nursing homes. While at CMS, Karen specialized in quality of life and resident rights for nursing home residents and was the agency lead for culture change. She was the CMS lead for the two national symposia with the Pioneer Network on Environment and Dining, produced the Hand in Hand Toolkit and co-developed the Artifacts of Culture Change. She is one of the founders of the national Culture Change movement and Pioneer Network. She is a founder of the Maryland Culture Change Coalition and a member of the Pennsylvania Culture Change Coalition.

## Evan Shulman

Evan Shulman has over 15 years of experience working with nursing facilities to improve the quality and care delivered to residents. Currently, he serves as the Deputy Director for the Division of Nursing Homes in the Survey and Certification Group within the Centers for Medicare and Medicaid Services (CMS). Evan began working at CMS in 2012 where he joined the Medicare-Medicaid Coordination Office to focus on enhancing care and coordination, improving quality and outcomes, and reducing Medicare-Medicaid expenditures for nursing facility residents. Prior to joining CMS, Evan worked for UnitedHealth Group where he served as the Vice President of Product Development for their nursing home product. Earlier in his career, Evan held general operational and management positions in the health care industry, all focused on improving care and outcomes for beneficiaries. Evan graduated from the University of Delaware and is a guest lecturer at Johns Hopkins University.

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## Daniel Timmel

Daniel Timmel, LCSW, started out as a clinical hospital social worker, concurrently teaching at the University of Maryland School of Medicine for 20 years, in Behavioral Pediatrics and hospice, dying and grief. Interested in improving population outcomes, he transitioned to public health, primarily improving maternal and child health care systems. In 2002, Dan came to CMS, in Medicaid Long-Term Care. Presently, he is responsible for Medicaid institutional long-term care coverage policy, including PASRR, and building the MACPro Medicaid information system.

## Lisa Tripp

Lisa Tripp is the Technical Director for Enforcement and Certification for the Centers for Medicare & Medicaid Services, Division of Nursing Homes. Prior to joining CMS, Lisa was an Associate Professor at Atlanta's John Marshall Law School, in Atlanta, Georgia, and an attorney for the U.S. Department of Health and Human Services (HHS). During her tenure as an attorney for HHS, Lisa focused primarily on long-term care enforcement. She litigated many cases involving physical and sexual abuse, elopements, falls, neglect, pressure sores, infection control, medication errors, and substandard quality of care. Lisa has been a member of the Consumer Voice Leadership Council, and has served on health quality measurement committees and panels focusing on long-term care for the National Quality Forum and the Medicare Payment Advisory Commission (MedPAC). She also co-developed and taught CMS's State Agency Director's Orientation Course, and has provided training to survey agencies and providers in North Carolina, Kentucky, Oregon, Wisconsin, Oklahoma, Kansas, South Carolina, Alabama, Iowa and Maine. Lisa received her law degree, with honors, from George Washington University Law School, in Washington, D.C.

## Karen Tritz

Karen Tritz is the Director of the Division of Nursing Homes in the Survey and Certification Group of CMS and joined that Division in February 2013. She started with the Survey and Certification Group in 2006, working with the federal team to implement the Medicare survey and certification process for organ transplant programs. Prior to joining CMS, she worked for the Congressional Research Service providing assistance to Members of Congress and their staff in developing legislation in key areas of long-term care, Medicaid and Medicare, and Part D. Karen has also previously worked with the Medicaid programs at both CMS and in the State of Wisconsin. She holds a master's degree in social work from Washington University in St. Louis, Missouri.

## Pamela Walz

Pamela Walz is the Co-Director of the Aging and Disabilities Unit at Community Legal Services, Inc. (CLS), where she represents low-income older adults and younger adults with disabilities in matters involving nursing home and personal care home residents' rights, access to home and community based long-term care services and public benefits. She received her J.D. from Harvard Law School in 1989 and graduated from the University of California, San Diego in 1986 with a degree in English Literature. In 1997, she was selected as a Fordham

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Foundation Fellow to study issues at the intersection of law, ethics, health care and aging at the Wright State University School of Medicine in Dayton, Ohio.

## Ann Wyatt

Ann Wyatt is currently a Project Coordinator for the Alzheimer's Association, NYC Chapter, working with three NYC nursing homes and three hospices to establish innovative palliative care programs for people with advanced dementia, based on the model developed by Beatitudes Campus and their partner, Hospice of the Valley in Phoenix, Arizona.

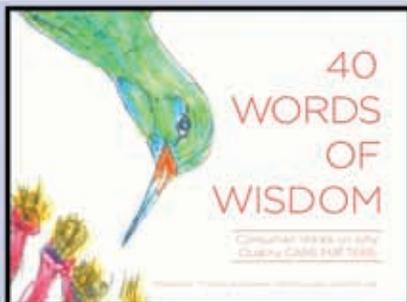
She has been a nursing home administrator, and is an MSW. As Associate Director of the Office of Long-Term Care, New York City Health and Hospitals Corporation (NYC's municipal hospital system) she helped to oversee OBRA implementation for HHC's nearly 3,000 skilled nursing beds. More recently, she coordinated the Cobble Hill-Isabella Collaboration Project, concerned with creating more person-centered care environments, and she worked with the United Hospital Fund on their family caregiver project, Next Step in Care.

She was a founding board member of the National Citizens' Coalition for Nursing Home Reform, of the Village Nursing Home, Inc., of Music and Memory, Inc. (the iPod project), and of Ibasho (an organization which works internationally to help create socially integrated, sustainable aging communities).

Her publications include two book chapters (in AIDS and Long-Term Care and HIV/AIDS and the Older Adult), and articles in Quality Review Bulletin; Long-Term Living; American Rehabilitation; Health and Social Work; and Pride Institute Journal.



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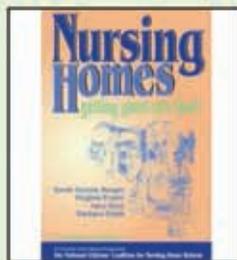
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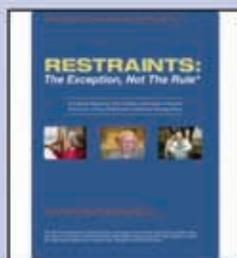
The Consumer Voice's widely acclaimed classic consumer guide. Includes dozens of specific advocacy strategies, checklists, and standards of care.

151 pages. 2002. Paperback



**Piecing Together Quality Long-Term Care: A Consumer's Guide to Choices and Advocacy - \$20**

This consumer guide educates people with disabilities and older adults about their options for long-term services and supports and empowers consumers to be self advocates for quality long-term care.



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This resource guide is designed to introduce nursing home residents, their families and friends to care practices that make the use of restraints the "exception not the rule."

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