

10 million Reasons



37th Annual Conference
October 24 - 27, 2013
Hilton Crystal City
Arlington, Virginia



10 Million Reasons ...

There are approximately 10 million individuals currently receiving long-term care, services and supports in the United States. Each and every one of these consumers is a reason we advocate every day for quality care and quality of life. We are all here this week with a shared vision of 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.

Welcome to the 2013 Consumer Voice Annual Conference!

What is your reason?

welcome to the conference



Dear Friends:

I am so very pleased to welcome you to the 2013 Consumer Voice Annual Conference! It was tough not having a meeting last year; we truly missed seeing you and sharing best practices and stories from the field. However, we took that time “off” to continue stabilizing the organization – and now we can bring back the conference better than ever!

The conference this year couldn’t be timelier; I do not have to tell you that there is a LOT going on in the field of long-term care and in aging policy. Between implementation of the Affordable Care Act, changes and developments in long-term care at the state level, and of course – the recent furlough and sequestration challenges – this has been one busy year. I hope you find the sessions here to be both thought-provoking and practical. The staff, along with our leadership and other advocates, have put together a top notch program on the most cutting-edge issues. This is also an excellent time to step back and network with your colleagues and hear what has been happening outside your own program, organization or backyard.

I want to thank the Consumer Voice staff for all of their efforts toward this year’s conference and for their amazing work at the organization in the past 12-months. I know I am biased, but I think the staff at this organization is simply the best out there. Thanks also to our Governing Board and Leadership Council, and you, for your ongoing support, expertise and passion for quality care.

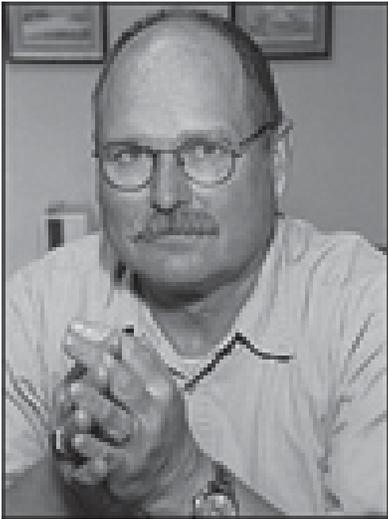
On a concluding note, you may have heard earlier in the month that I gave notice of my resignation as Executive Director and will depart shortly after the conference concludes. Leaving this tremendous organization – and incredible network of advocates – is a very difficult decision. I am looking forward to the next chapter of my career, in the form of a startup small business; but I will miss you so very much. Thank you for everything over the past five years. Please continue to engage in and support this awesome organization and carry forth a tradition of fighting for the quality long-term care we all know people need and deserve.

With sincere appreciation,

A handwritten signature in cursive script that reads "Sarah Wells". The signature is written in dark ink on a light-colored background.

Sarah Wells
Executive Director

welcome to the conference



Dear Conference Attendees:

Welcome to the 37th Consumer Voice Annual Conference. On behalf of the Governing Board, I want to extend our thanks to you for attending this conference. We come from varied backgrounds, geographies and work settings representing academic institutions, ombudsman programs, public and private organizations, citizen advocacy groups, independent advocates, individual consumers of long-term services and supports and family members. We come with a shared passion for quality and a commitment to defending the rights of consumers: without regard to care setting and the economic circumstances of consumers.

I do hope you will find the content and networking available though the conference useful, energizing and of value to you when you return to your homes. I also hope you will enjoy the amenities in the hotel and in the Arlington area. Please feel free to let me know how we are doing. I would enjoy meeting and talking with you if the opportunity arises. In the meantime, enjoy your time with us and most of all, enjoy the conference!

Sincerely,

A handwritten signature in dark ink, appearing to read "Bill Lamb". The signature is fluid and cursive, with the first name "Bill" and the last name "Lamb" clearly distinguishable.

Bill Lamb
Governing Board President

about us



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

The National Consumer Voice for Quality Long-Term Care, or Consumer Voice, 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 make sure consumers are empowered to advocate for themselves. We are a primary source of information and tools for consumers, families, caregivers, advocates and ombudsmen to help ensure quality care for the individual. The Consumer Voice 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

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.

2012–2013 Governing Board

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



Bill Lamb
President



John Weir
Immediate Past President



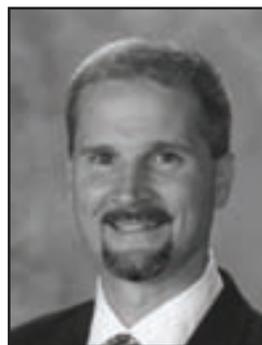
Afsoon Namini
Vice President



Paul van Westrienen
Treasurer



Gail MacInnes
Secretary



Michael Koenig
Member



Mary Ellen Jacobs
Member

consumer voice leadership council

2012–2013 Leadership Council

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

Lisa Tripp, Chair

Deb Holtz, Vice Chair

Julie Pollock, Secretary

Beverley Laubert

Jessica Brill Ortiz

Brian Lee

Michelle Brown

Dean Lerner

Brian Capshaw

Steven Levin

Claire Curry

Mitzi McFatrach

Eric Carlson

Heather Porreca

Toby Edelman

Sarah Slocum

Courtney Freels

Karen Stevens

Donna Gillette

Patricia Warnick

Wilmarie Gonzalez

Lydia Williams

consumer voice staff

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

Robyn Grant, MSW is the Director of 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.

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

Amity Overall-Laib, MA, Manager, Long-Term Care Ombudsman Program & Policy, 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 Ombudsmen 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 also previously a consultant to NORC. Amity has a master's degree in sociology from the University of Houston.

Alia Murphy joined Consumer Voice in November of 2010 and currently serves as the Long-Term Care Ombudsman Program and Policy Associate for the National Long-Term Care Ombudsman Resource Center (NORC). In her role, she helps to coordinate training opportunities, provides technical support, creates and disseminates educational resources, manages and develops the NORC website, assists with numerous communications efforts and manages office operations. Alia also manages and administers Consumer Voice's Frances Lane Memorial Family Council Fund of the Edward H. Lane Foundation. Prior to this position, she served as the Program and Development Associate with Consumer Voice. Alia graduated with highest honors from the Georgia Institute of Technology in 2009 with a B.S. in International Affairs and a minor in History.

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.

Sara Cirba, Esq., joined Consumer Voice in May of 2012 and currently serves as the Advocacy and Development Associate. In her role, she supports the Director of Public Policy in expanding support for and engaging advocates in the implementation of Consumer Voice's public policy and advocacy agenda, as well as supporting the Executive Director on fundraising activities to expand financial support for Consumer Voice's work. Prior to joining Consumer Voice, Sara completed a prestigious legislative fellowship in the New York State Senate where she was instrumental in creating the NYS Bipartisan Pro-Choice Legislative Caucus. Sara graduated *cum laude* from Ithaca College in 2005 with a B.S. in communications and a minor in legal studies. Sara also has a Juris Doctorate from Albany Law School and graduated with a health law concentration in 2010.

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

Sara Hunt, Consultant to NORC

Maria Greene, Consultant to NORC

Janet Forlini, Consultant to the Nursing Home Staffing Campaign

Ira Hirsh, RedTongue (Conference Audio/Visual)

making it happen: conference sponsors

The Consumer Voice sincerely thanks each of our sponsors for supporting the 37th Annual Conference & Meeting. Sponsor support enables the Consumer Voice to keep registration fees affordable and to offer scholarships to those who would otherwise be unable to attend.

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

Mission Champions

The American Association for Justice (AAJ)'s Nursing Home Litigation Group



Consumer Voice Partners



Consumer Voice Friends

Direct Care Alliance

National Association of Local Long-Term Care Ombudsmen

Assisted Living Consumer Alliance

National Association of Social Workers

National Partnership for Women & Families

**Thank you to the Following Former and Current Consumer Voice/
NCCNHR Board and Staff for their Conference Support**

Debby Allen

Elma Holder

Beverly A. Bryant-Ray

Deb Holtz

Sarah Burger

Joani Latimer

Jeff Crollard

Beverly Laubert

Sherry Culp

Wendy Meltzer

Hilke Faber

Diane Menio

Margaret Farley

Cynthia Rudder

Arlene Germain

Scott Severns

Wilmarie Gonzalez

Sarah Slocum

Alice Hedt

Lisa Tripp

Alison Hirschel

Jacquie Woodruff

conference highlights

As you review the conference schedule, don't miss these unique opportunities during the 2013 Annual Conference & Meeting.

You Won't Want to Miss...

THURSDAY, OCTOBER 24, 6:30 P.M. - 8:00 P.M.

Welcome Reception (Open to All Conference Participants)

Join us for the opening night reception in the Madison/Adams ballroom. The reception will include heavy hors d'oeuvres and a cash bar.

FRIDAY, OCTOBER 25, 7:30 A.M. - 8:15 A.M.

First Time Attendee Orientation

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!

FRIDAY, OCTOBER 25, 12:00 P.M. - 2:00 P.M.

Residents' Rights Month Luncheon

We invite you to a special luncheon for residents and advocates with special guest speaker, Kathy Greenlee, Administrator, Administration for Community Living; Assistant Secretary, Administration on Aging.

FRIDAY, OCTOBER 25, 6:30 P.M. - 9:30 P.M.

Reception

Please join us for a fun, free social/networking event with appetizers, cash bar and DJ. Open to all!

SATURDAY, OCTOBER 26, 12:00 P.M. - 1:30 P.M.

Consumer Voice Awards Luncheon & National Policy Update

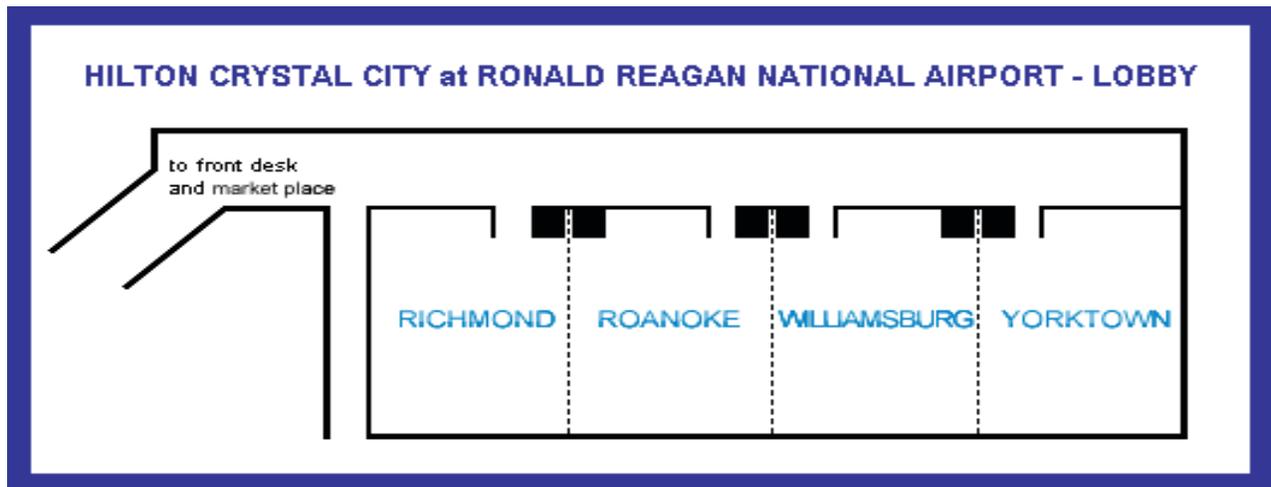
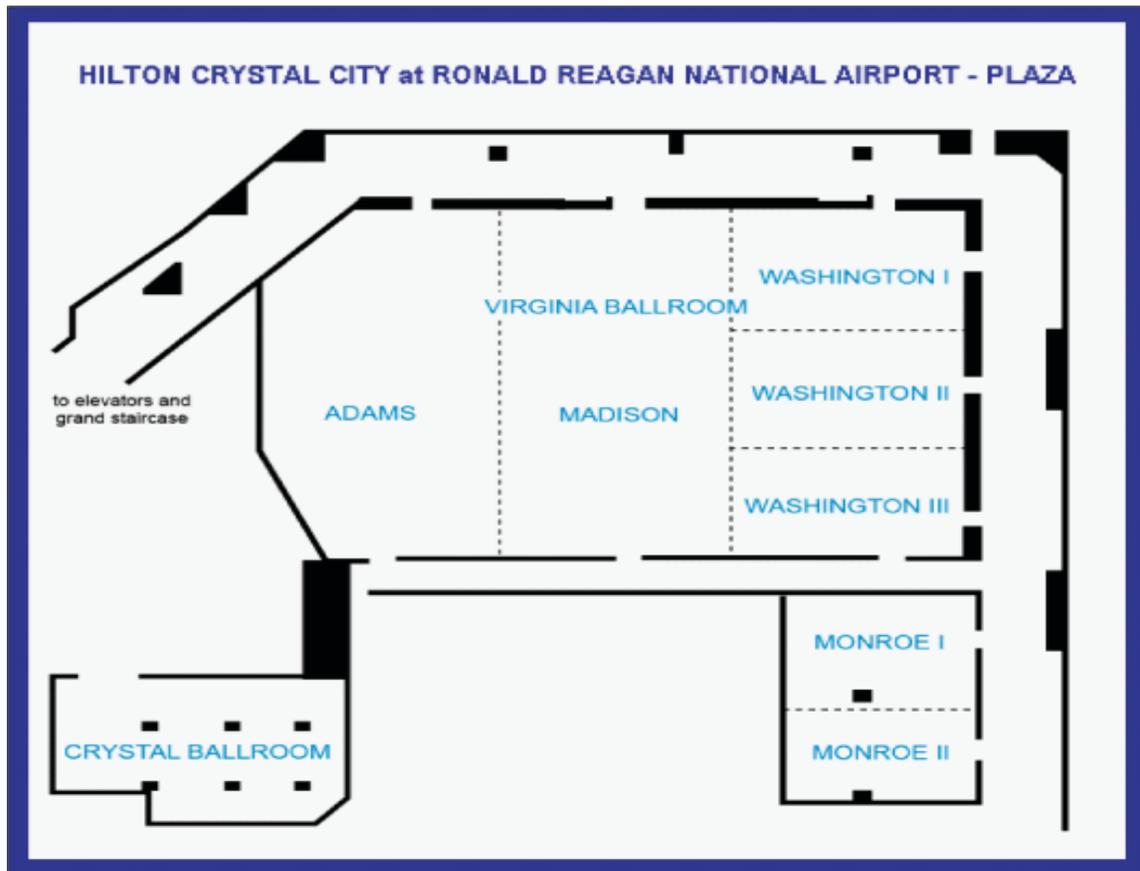
Please join us in honoring the 2013 Consumer Voice Leadership awardees and hear the latest national policy happenings.

SUNDAY, OCTOBER 27, 9:00 A.M. - 12:00 P.M.

Plenary: Enhancing Well-Being in Older Adults Living with Dementia

Dr. G. Allen Power will share his time-tested strategies for engaging individuals with dementia in a meaningful way in order to provide compassionate, person-centered care without drugs.

hotel information



2399 Jefferson Davis Highway
Arlington, Virginia
USA 22202
Tel: +1-703-418-6800
Fax: +1-703-418-3763

schedule at a glance

THURSDAY, OCTOBER 24

8:00 a.m. – 12:00 p.m.	New SLTCO Orientation (By invitation only) <i>Yorktown/Williamsburg</i>
1:00 p.m. – 5:00 p.m.	NASOP Membership Meeting (By invitation only) <i>Yorktown/Williamsburg</i>
5:00 p.m. – 8:00 p.m.	Registration Open <i>Virginia Ballroom Foyer</i>
6:30 p.m. – 8:00 p.m.	Welcome Reception provided by Consumer Voice (Open to all conference participants) <i>Madison/Adams</i>

FRIDAY, OCTOBER 25

7:00 a.m. – 7:00 p.m.	Registration Open <i>Virginia Ballroom Foyer</i>
7:00 a.m. – 8:00 a.m.	Breakfast on Your Own
7:30 a.m. – 8:15 a.m.	First-Time Attendee Orientation <i>Washington I</i>
8:30 a.m. – 9:00 a.m.	Conference Opening & Welcome <i>Madison/Adams</i>
9:00 a.m. – 10:15 a.m.	Plenary: Managed Long-Term Services and Supports: What Does it Really Mean for Consumers? <i>Madison/Adams</i>
10:15 a.m. – 10:30 a.m.	Coffee Break Provided by Consumer Voice
10:30 a.m. – 11:45 a.m.	Breakout Sessions: <ul style="list-style-type: none">• State Dual Integration Projects: What's Going On? <i>Yorktown</i>• The Who, What, When, Where and How of Ombudsman Services for Home Care Consumers <i>Williamsburg</i>• Engaging Family Members in Advocacy <i>Roanoke</i>• Improving the Quality of Care by Strengthening the Direct Care Workforce <i>Richmond</i>
12:00 p.m. – 2:00 p.m.	Luncheon - Residents' Rights Month 2013: Speak Out Against Elder Abuse! (Open and free for all conference participants) <i>Madison/Adams</i>
2:00 p.m. – 2:30 p.m.	Break
2:30 p.m. – 3:45 p.m.	Breakout Sessions: <ul style="list-style-type: none">• POLST and other Advanced Care Planning Tools <i>Williamsburg</i>• Advocacy for Victims of Abuse: How to Engage Law Enforcement and Support Residents <i>Roanoke</i>• Combating Financial Exploitation <i>Richmond</i>• Community Partnerships: How a Group of Nursing Home Residents and Young Physicians Work Together to Address Quality of Life Issues <i>Yorktown</i>
3:45 p.m. – 4:00 p.m.	Break
4:00 p.m. – 5:15 p.m.	Plenary: Coordinating Efforts Against Elder Abuse: Making A Systems Difference <i>Madison/Adams</i>
5:30 p.m. – 6:30 p.m.	Assisted Living Consumer Alliance (ALCA) Membership Meeting (Open to all conference participants) <i>Yorktown</i>
5:30 p.m. – 6:30 p.m.	National Association of Local Long-Term Care Ombudsmen (NALLTCO) Membership Meeting (Open to all regional/local ombudsmen) <i>Roanoke</i>
6:30 p.m. – 9:30 p.m.	Networking Reception with Entertainment (Open to all) <i>Crystal Ballroom</i>

SATURDAY, OCTOBER 26

7:00 a.m. – 9:00 a.m.	Registration Open <i>Virginia Ballroom Foyer</i>
7:00 a.m. – 9:00 a.m.	Breakfast on Your Own
9:00 a.m. – 10:15 a.m.	Plenary: Where is the Quality in Assisted Living? <i>Madison/Adams</i>
10:15 a.m. – 10:30 a.m.	Coffee Break Provided by Consumer Voice
10:30 a.m. – 11:45 a.m.	Breakout Sessions: <ul style="list-style-type: none">• Consumer Protections in Assisted Living <i>Yorktown</i>• Supporting Consumers Who Transition Out of Facilities <i>Williamsburg</i>• Ombudsman Advocacy in Assisted Living/Board and Care: Past, Present and Future <i>Roanoke</i>• The Role of the Physician in Improving Nursing Home Quality <i>Richmond</i>
11:45 a.m. – 12:00 p.m.	Break
12:00 p.m. – 1:30 p.m.	Consumer Voice Awards Luncheon & National Policy Update (Lunch Provided by Consumer Voice; Open to all) <i>Madison/Adams</i>
1:30 p.m. – 2:00 p.m.	Break
2:00 p.m. – 3:15 p.m.	Breakout Sessions: <ul style="list-style-type: none">• Strategies for Successful Advocacy: Part I <i>Yorktown</i>• Deficiencies for Misuse of Antipsychotic Medications in Nursing Homes <i>Williamsburg</i>• Making Guardianship Work for Vulnerable Elders <i>Roanoke</i>• Working with Today's Volunteers: How to Fully Utilize Their Skills While Minimizing Risk <i>Richmond</i>
3:15 p.m. – 3:30 p.m.	Break
3:30 p.m. – 4:45 p.m.	Breakout Sessions: <ul style="list-style-type: none">• Strategies for Successful Advocacy: Part II <i>Yorktown</i>• QAPI's Coming—Are you Ready? <i>Williamsburg</i>• Involuntary Transfer and Discharge: Hot Topic Issues - Ask the Experts! <i>Roanoke</i>• Making the Most of Your Ombudsman Training Program <i>Richmond</i>
4:45 p.m. – 5:00 p.m.	Break
5:00 p.m. – 5:45 p.m.	Consumer Voice Annual Business Meeting (Open to all conference participants) <i>Williamsburg</i>
6:00 p.m.	Dinner on Your Own
6:00 p.m. – 7:30 p.m.	Consumer Voice Governing Board Meeting (By invitation only) <i>Patrick Henry Executive Boardroom</i>
6:00 p.m. – 7:30 p.m.	Consumer Voice Leadership Council Meeting (By invitation only) <i>Yorktown</i>

SUNDAY, OCTOBER 27

7:00 a.m. – 7:00 p.m.	Registration Open <i>Virginia Ballroom Foyer</i>
8:00 a.m. – 9:00 a.m.	Breakfast Provided by Consumer Voice <i>Madison/Adams</i>
9:00 a.m. – 12:00 p.m.	Plenary: Enhancing Well-Being in Older Adults Living with Dementia <i>Madison/Adams</i> Dr. G. Allen Power
12:00 p.m. – 12:15 p.m.	Conference Closing <i>Madison/Adams</i>

thursday, october 24

8:00 a.m. – 12:00 p.m.

New State Long-Term Care Ombudsman Orientation (By invitation only)
Breakfast is served at 7:30 a.m. *Yorktown/Williamsburg*

1:00 p.m. – 5:00 p.m.

National Association of State Long-Term Care Ombudsman Programs (NASOP) Membership Meeting (By invitation only) *Yorktown/Williamsburg*

6:30 p.m. – 8:00 p.m.

Welcome Reception Provided by Consumer Voice (Open to all conference participants) *Madison/Adams*

friday, october 25

7:00 a.m. – 7:00 p.m.

Registration Open *Virginia Ballroom Foyer*

7:00 a.m. – 8:00 a.m.

Breakfast on Your Own

7:30 a.m. – 8:15 a.m.

First-Time Attendee Orientation *Washington I*

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!

8:30 a.m. – 9:00 a.m.

Welcome & Introductions *Madison/Adams*

Featuring Sarah Wells, Executive Director, Consumer Voice and Bill Lamb, President, Consumer Voice Governing Board

9:00 a.m. – 10:15 a.m.

 **Plenary: Managed Long-Term Services and Supports: What Does it Really Mean for Consumers?** *Madison/Adams*

Presenters: Alice Dembner, Project Director, Substance Use Disorders, Community Catalyst; Wendy Fox-Grage, M.S.G., M.P.A, AARP Public Policy Institute; Gwen Orłowski, Senior Staff Attorney, National Senior Citizens Law Center

States are jumping headfirst into contracting with managed care companies to provide long-term services and supports. But what does this mean for consumer choice, protections, quality and coordination of services, and cost? Get a national perspective and hear about the trends in states' plans and what these managed care contracts mean for quality and evaluation of care and services. Engage in dialogue around how consumers and their advocates can impact plan development and implementation in their states and at the national level.

10:15 a.m. – 10:30 a.m.

Coffee Break Provided by Consumer Voice

10:30 a.m. – 11:45 a.m.

Breakout Sessions

State Dual Integration Projects - What's Going On? *Yorktown*

Presenters: Fay Gordon, Staff Attorney, National Senior Citizens Law Center; Beverley Laubert, State Long-Term Care Ombudsman, Ohio State Long-Term Care Ombudsman Program; Karla Warren, Legal Services Developer, Ohio State Long-Term Care Ombudsman Program; Brian Capshaw, Connecticut Statewide Coalition of Presidents of Resident Councils

Get an update on how states are implementing their Dual Integration Projects. Hear an overview of the different components of the project including implementation and oversight, the three-way contracts and MOUs, and opportunities for consumer involvement and advocacy. You will also hear how one state long-term care ombudsman program has been written into the dual demonstration project to fulfill the required ombudsman role.

The Who, What, When, Where and How of Ombudsman Services for Home Care Consumers *Williamsburg*

Presenters: Becky Kurtz, Director, Office of Long-Term Care Ombudsman Programs, Administration on Aging, Administration for Community Living; Lynne Person, State Long-Term Care Ombudsman, D.C. Long-Term Care Ombudsman Program; Melanie McNeil, State Long-Term Care Ombudsman, Georgia State Long-Term Care Ombudsman Program

An increasing number of states are looking at options for advocacy for home care consumers. The Older Americans Act Reauthorization Act of 2013 would give ombudsman programs the authority to continue to serve residents transitioning from a long-term care facility to a home care setting, and there are opportunities to provide ombudsman services to clients of Money Follows the Person (MFP), managed care and dual integration programs. What does it take to develop a home care ombudsman program? During this session, participants will look at different options for creating a home care ombudsman program and hear about issues such as funding, scope of services, authority and oversight, staffing and more from states that have already made these decisions.

Engaging Family Members in Advocacy *Roanoke*

Presenters: Linda Kincaid, Family Member and Advocate; Mary Ann Parker, Attorney, D.C. Long-Term Care Ombudsman Program; Joy Stern, Family Member and Advocate

This session will present best practices for family member advocacy from two perspectives. Participants will first hear how citizen advocacy groups and ombudsman programs can engage family members in advocacy efforts. They will then learn how individual family members can be successful as independent advocates. Presenters include family members who have made an impact at the local, state and national level.

Improving the Quality of Care by Strengthening the Direct Care Workforce *Richmond*

Presenters: Jessica Brill Ortiz, MPA, National Advocacy Director, Direct Care Alliance; Sara Cirba, Esq., Advocacy and Development Associate, National Consumer Voice for Quality Long-Term Care; Gail MacInnes, National Policy Analyst, PHI

A stronger home care workforce translates to a higher quality of care for the home care consumer. Why is that? What is needed to strengthen the home care workforce? How do consumers themselves feel about the home care workforce? This session will answer those questions and show how a stronger home care workforce helps to make workers' lives better, increases job satisfaction, reduces stress and improves morale – all of which means better care for consumers. Participants will also leave this session with tangible action steps they can take to directly advocate for a strengthened home care workforce.

12:00 p.m. – 2:00 p.m.

Luncheon - Residents' Rights Month: Speak Out Against Elder Abuse!
(Open to and free for all conference participants) *Madison/Adams*

Facilitator: Sarah Wells, Executive Director, Consumer Voice

Presentation of Cernoria Johnson Memorial Advocacy Award to Gilbert Cruz (posthumously)

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.



Gilbert Cruz, Former Kansas SLTCO

Gilbert Cruz was born and raised in Garden City, Kansas. He graduated Garden City High School in 1988. After joining the U. S. Army, he was deployed with the 467th Fire Fighting Engineer Platoon in 1990 for Operation Desert Shield/Storm and awarded the Kuwaiti Liberation Medal. In 1994, he graduated with a Bachelor of Science degree in Respiratory Care from the University of Kansas Medical Center. Later, he received his Master of Public Health Administration from the University of Missouri-

Kansas City. Realizing his passion for the elderly, he furthered his desire and achieved his long-term care administrator's license. Gilbert was appointed by then-Kansas Governor Kathleen Sebelius to serve as the State Long-Term Care Ombudsman for Kansas. He showed compassion, commitment and expertise for the elderly as an advocate of change. It was his goal to exemplify the need for a high quality of care in the long-term care population. At the time of his death, Gilbert was the Chief Operating Officer for Connections365, a tele-health monitoring company in Carmel, California. Gilbert's greatest love was his family, advocating for long-term health care, and serving his community.



Special Guest: Kathy Greenlee, Administrator, Administration for Community Living; Assistant Secretary, Administration on Aging.

Luncheon Plenary Presentation: Misuse of Antipsychotic Medications - Getting Good Care Without Drugs

Presenters: Morris Kaplan, Operating Partner, Gwynedd Square Nursing Center; Tony Chicotel, Staff Attorney, California Advocates for Nursing Home Reform

Take a look at how one long-term care facility provides resident-centered quality care without the use of antipsychotic medications; and identify strategies for advocacy in your state.

friday, october 25

2:00 p.m. – 2:30 p.m.

Break

2:30 p.m. – 3:45 p.m.

Breakout Sessions

POLST and other Advanced Care Planning Tools *Williamsburg*

Presenters: Mickey MacIntyre, Chief Program Officer, Compassion & Choices; Joseph Rodrigues, State Long-Term Care Ombudsman, California State Long-Term Care Ombudsman Program

Physician Orders for Life Sustaining Treatment (POLST) Programs are cropping up all over the country. What are they? How do they work? Engage in a dialogue about POLST and other advanced care planning tools which are designed to promote individual decision-making and choice over care and treatments at the end of life. Hear about how one state has been implementing and educating about POLST.

Advocacy for Victims of Abuse: How to Engage Law Enforcement and Support Residents *Roanoke*

Presenter: Kathryn Lanier, Elder Rights Section Chief, North Carolina Long-Term Care Ombudsman Program, North Carolina Division of Aging and Adult Services

Abuse is a crime and incidents of abuse occur in all types of long-term care settings, but incidents are often unidentified or unreported. How do you proceed if you suspect abuse or receive an allegation of abuse of a resident? Who do you call and when? How can you support the resident before, during and after the investigation? How do you get law enforcement to investigate the case, and what information do they need – especially if the resident is incapacitated? Join us to learn how advocates and law enforcement can work together to protect residents.

Combating Financial Exploitation *Richmond*

Presenters: Esther Houser, Oklahoma State Long-Term Care Ombudsman, Oklahoma State Long-Term Care Ombudsman Program; Hector Ortiz, Ph.D., Policy Analyst, Office for Older Americans of the Consumer Financial Protection Bureau; Lisa Schifferle, Attorney, Federal Trade Commission's Division of Privacy and Identity Protection

Financial exploitation of older adults has become more prevalent over the last several years. Why? How do we combat this? This session will explore why financial exploitation is on the rise and what federal agencies are doing about it. This session will also provide training techniques and educational strategies to prevent, identify and respond to financial exploitation of older adults at the local levels. Lastly, this session will provide a real-life example of how one local coalition came together and now works to identify and prevent financial exploitation.

Community Partnerships: How a Group of Nursing Home Residents and Young Physicians Work Together to Address Quality of Life Issues *Yorktown*

Presenters: Lori Walsh, Program Manager, Center for Advocacy for the Rights and Interests of the Elderly (CARIE); Dr. Pooja Mehta, Robert Wood Johnson

friday, october 25

Scholar, University of Pennsylvania; Yvette Green, Pennsylvania Empowered Expert Residents (PEER) Program, Long-Term Care Consumer

Ever wonder what could happen if nursing home residents are given an opportunity to be part of the solution? This session will describe a unique collaboration that was created working with the University of Pennsylvania Robert Wood Johnson Clinical Scholars Program, PEER advocates at Inglis House in Philadelphia, and the Philadelphia LTC Ombudsman Program at CARIE. Over one intense summer, a group of young physicians and a group of nursing home residents worked together to create a framework for addressing quality of life issues. This project will be used as a springboard to create change for nursing home residents everywhere. The end result is recommendations voiced by nursing home residents and supported by the Scholars Program, the Philadelphia LTC Ombudsman Program at CARIE and Inglis House.

3:45 p.m. – 4:00 p.m.

Break

4:00 p.m. – 5:15 p.m.

Plenary: Coordinating Efforts Against Elder Abuse: Making A Systems Difference *Madison/Adams*

Presenters: Andy Mao, Senior Counsel for Health Care Fraud and Elder Justice, U.S. Department of Justice; Mary Twomey, Director, National Center on Elder Abuse; Bob Blancato, Matz & Blancato, Elder Justice Coalition

Facilitator: Alison Hirschel, Elder Law Attorney, Michigan Poverty Law Program; Director, Michigan Elder Justice Initiative

2013 is the Year of Elder Abuse Prevention (YEAP). The issue is receiving more attention than it ever has. During this session, hear from national experts about national programs and policies to combat elder abuse and areas for which advocacy is needed. Get the latest updates on Older Americans Act Reauthorization and implementation of the Elder Justice Act. Find ways you can get involved and make a difference.

5:30 p.m. – 6:30 p.m.

Membership Meetings

Assisted Living Consumer Alliance (ALCA) (Open to all conference participants) *Yorktown*

National Association of Local Long-Term Care Ombudsmen (NALLTCO) (Open to all local/regional ombudsmen) *Roanoke*

6:30 p.m. – 9:30 p.m.

Networking Reception provided by the Consumer Voice
(Open to all) *Crystal Ballroom*

Please join us for a fun, free social/networking event with appetizers, cash bar and DJ.

saturday, october 26

7:00 a.m. – 7:00 p.m.

Registration Open *Virginia Ballroom Foyer*

7:00 a.m. – 9:00 a.m.

Breakfast on Your Own

9:00 a.m. – 10:15 a.m.



Plenary: Where is the Quality in Assisted Living? *Madison/Adams*

Presenters: Catherine Hawes, PhD; Eric Carlson, Directing Attorney, National Senior Citizens Law Center; Andrea Buck, Office of Inspector General, Department of Health & Human Services

Official Listeners: Oliver Kim and Rachel Pryor, U.S. Senate Special Committee on Aging, invited

More and more consumers are turning to assisted living as way to obtain choice and self-determination in a residential setting and as an alternative to nursing homes. At the same time, an ever-increasing amount of public dollars are being allocated to assisted living. But are quality services being provided? Has quality been impacted by a change in the characteristics and needs of residents in this setting? What have government investigations found? This session will examine the level of quality in assisted living across the country and explore what advocates at both the state and national level can to improve quality.

10:15 a.m. – 10:30 a.m.

Coffee Break Provided by Consumer Voice

10:30 a.m. – 11:45 a.m.

Breakout Sessions

Consumer Protections in Assisted Living *Yorktown*

Presenters: Jeff Crollard, Attorney, Washington State Long-Term Care Ombudsman Program; Gwen Orłowski, Senior Staff Attorney, National Senior Citizens Law Center (NSCLC)

Absent federal standards in assisted living, how can advocates work to ensure that residents in their states have adequate consumer protections in place in the assisted living setting? Are there model state regulations? This session will identify strategies to advocate for better assisted living protections in your state, plus identify other legal resources that consumers can tap into, such as Landlord/Tenant laws, Fair Housing laws, contract language and Unfair and Deceptive Acts and Practices Statutes (UDAPs).

Supporting Consumers Who Transition Out of Facilities *Williamsburg*

Presenters: Robyn Grant, Director of Public Policy & Advocacy, National Consumer Voice for Quality Long-Term Care; Regina Barnett and Linda Merkle, Sunshine Folk; Victor Orija, State Long-Term Care Ombudsman, Delaware State Long-Term Care Ombudsman.

This session will focus on the supports consumers need when transitioning out of a nursing home into a home or community setting. We will share findings from consumers who have actually transitioned – hear what worked, what didn't, and what could have been done better. We will also discuss the roles of others, such as the long-term care ombudsman, in supporting the individual.

Ombudsman Advocacy in Assisted Living/Board and Care: Past, Present and Future *Roanoke*

Presenters: Louise Ryan, Ombudsman Program Specialist, Office of Long-Term Care Ombudsman Programs, Administration on Aging, Administration for Community Living (AoA/ACL); Patricia Hunter, State Long-Term Care Ombudsman, Washington State Long-Term Care Ombudsman Program; Heather Porreca, Denver Regional Council of Governments

Ombudsman programs are required to provide services in assisted living and board and care facilities, but how fully engaged are they in that setting? What are the barriers for those programs that are not as active? What strategies are used by LTCO programs that are more active? How can ombudsman programs be present and effective in this setting?

The Role of the Physician in Improving Nursing Home Quality *Richmond*

Presenter: Jonathan Evans, M.D., CMD, President, American Medical Directors Association

Physicians, including the Medical Director, are critical partners in achieving quality for long-term care residents. What should residents and families expect from their physician in long-term care? What is the role of the Medical Director? Engage in this discussion around how to most effectively work with your physician and Medical Director, and how to get what you need from them. Understand the roles of Physician's Assistants and Nurse Practitioners in long-term care.

11:45 a.m. – 12:00 p.m.

Break

12:00 p.m. – 1:30 p.m.

 **Consumer Voice Awards Luncheon & National Policy Update** (Lunch Provided by Consumer Voice; open to all) *Madison/Adams*
Facilitator: Bill Lamb, Consumer Voice Governing Board President

Janet Tulloch Memorial Advocacy Award

The 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 or long-term care consumer (e.g. resident of a nursing home or assisted living facility or an individual receiving home and community-based services) who has worked directly with and for residents to improve the lives of long-term-care residents.



Arlene Germain

Arlene Germain co-founded the Massachusetts Advocates for Nursing Home Reform (MANHR) in 2000, and has been MANHR's president since 2004. MANHR, an all-volunteer organization, is the sole statewide consumer group working to improve the quality of care and quality of life for Massachusetts nursing home residents. Arlene represents MANHR in statewide coalitions, mentors family-run councils, and champions many advocacy issues to improve the lives of nursing home residents.

Arlene also was instrumental in authoring state family council legislation, enacted in 2004. Massachusetts was the third state in the country to enact such a law. On a national level, she served on the Board of the Consumer Voice from 2005-07. She began her elder advocacy efforts 16 years ago when her mother entered a nursing home, and over those years, she has been involved in the care of eight loved ones in seven Massachusetts facilities. These relationships and care experiences are the driving force behind her advocacy efforts. Arlene retired from an accounting career in 2011 and now devotes the majority of her time to MANHR.

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 individual who has effectively advocated for long-term care consumers on the local level.



Sylvia Taylor Stein

Sylvia Taylor Stein has served as the Executive Director of Long Term Care Services (LTCS) of Ventura County, Inc., Ombudsman Program since September 1999.

During her tenure, she has significantly expanded the organization's capacity to advance a healthy and safe environment for long-term care seniors by building a strong base of professional state-certified ombudsman staff and volunteers who make frequent visits to 234 long-term care facilities and investigate complaints and

concerns on behalf of approximately 8,500 elderly residents. She has established several initiatives including Operation Senior Santa; Latino Ombudsman Project; Generation Zap - Caregiver Training Workshops, and she is the executive producer of "Caring for a Loved One at Home" a 12-volume DVD training program for unpaid inexperienced in-home caregivers.

Over the past three years, she has focused her efforts in the area of reducing the use of antipsychotic drugs in long-term care facilities. Hosting three symposia and workshops to providers, licensees and medical professionals, Ventura County leads California in the reduction of these drugs in long-term care.

She is on the Board of Directors for the California Association of Long-Term Care Ventura County Rapid Response Team, and the Advisory Council for the Area Agency on Aging. She is currently on the forefront of legislative action to create a stronger Ombudsman program in California.

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.



Alice Bonner, PhD, RN, FAANP, FGSA

Alice Bonner has been a geriatric nurse practitioner, caring for nursing home residents and their families for over 24 years. She is currently an Associate Professor in the School of Nursing and a Faculty Associate in the Center for Health Policy, Bouve College of Health Sciences at Northeastern University in Massachusetts.

From 2009-2011, Dr. Bonner was the Director of the Bureau of Health Care Safety and Quality at the Massachusetts Department of Public Health in Boston, MA. From 2011 to 2013, she served as Director of the Division of Nursing Homes in the Center for Clinical Standards and Quality within the Centers for Medicare and Medicaid Services (CMS) in Baltimore, MD.

While at CMS, Dr. Bonner worked closely with state and federal agencies, quality improvement organizations, advocates, clinicians and researchers on continuously improving quality and safety in nursing homes. She is now working with faculty and students on translational research and scalable programs to enhance care and services for older adults across all settings.

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.



Anne Montgomery

Anne Montgomery is a Senior Policy Analyst at the Altarum Institute's Center for Elder Care and Advanced Illness and a Visiting Scholar at the National Academy of Social Insurance.

From 2007 to 2013, Ms. Montgomery served as Senior Policy Advisor for the U.S. Senate Special Committee on Aging, where she was responsible for developing hearings and legislation to improve nursing homes and home and community-based services in Medicaid, dually-eligible beneficiaries, health care workforce issues, elder abuse, dementia care, and community and social support services for older adults.

Ms. Montgomery has also served as a senior health policy associate with the Alliance for Health Reform in Washington, D.C., as a senior analyst in public health at the U.S. Government Accountability Office, and as a legislative aide for the Ways & Means Health Subcommittee. Based in London as an Atlantic Fellow in Public Policy in 2001-2002, she undertook comparative policy analysis of the role of family caregivers in the development of long-term care in the United Kingdom and the U.S. During the 1990's, Ms. Montgomery worked as a health and science journalist covering the National Institutes of Health and Congress.

A member of the National Academy of Social Insurance and Academy Health, Ms. Montgomery has an M.S. in journalism from Columbia University and a B.A. in English literature from the University of Virginia, and has taken gerontology coursework at Johns Hopkins University.

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.



Catherine Hawes, PhD

Catherine Hawes, Ph.D., is a Regents Professor in the School of Public Health at Texas A&M University. She has devoted her 34 year career to research, teaching, advocacy and policy-making in long-term care.

During this time she worked for the US Senate Special Committee on Aging, was Executive Director of the Ohio General Assembly's Nursing Home Commission, helping ensure the passage of the first residents' bill of rights in Ohio and an omnibus reform bill. After a brief foray at Duke, she moved to RTI where she led more than 20 research projects in LTC. These included leading the team that developed the MDS/RAI, heading a study of the effect of regulation on board and home quality, and leading the first national study of assisted living for the frail elderly.

At Texas A&M, her research has largely focused on detecting and preventing elder abuse in residential LTC settings in studies for the NIA and NIJ. Her publications have been among the most highly cited in the world (among the top .05% of social scientists). More important, throughout her career, she has -- at the urging and with the help and inspiration of Elma Holder, Barbara Frank, and Toby Edelman -- sought to use her research findings to inform LTC policy. She has testified before the Congress eight times as an expert and served on the Institute of Medicine's Nursing Home Committee, with recommendations that were largely adopted by Congress as the OBRA 1987 nursing home reforms. She also recently appeared on the Frontline special, "Life and Death in Assisted Living."

Thank You to the Selection Committee

Consumer Voice received several nominations of individuals devoted to improving long-term care services and supports. We appreciate the nominations that were submitted and are extremely grateful for the members of our Governing Board and Leadership Council that volunteered to serve on the Leadership Award Selection Committee to review the numerous qualified nominees and select the award recipients. We extend our thanks to John Weir, Gail MacInnes, Lisa Tripp, Julie Pollock, Beverley Laubert, Michelle Brown and Heather Porreca.

saturday, october 26

1:30 p.m. – 2:00 p.m.

Break

2:00 p.m. – 3:15 p.m.

Breakout Sessions

Strategies for Successful Advocacy: Part I *Yorktown*

Presenter: Mike Splaine, Owner and Principal, Splaine Consulting

Identify best practices for successful advocacy, including setting your advocacy goals, developing a communications strategy, crafting a message for maximum impact, responsible use of social media, and working with media outlets.

Deficiencies for Misuse of Antipsychotic Medications in Nursing Homes *Williamsburg*

Presenters: Toby Edelman, Attorney, Center for Medicare Advocacy; Dean Lerner, Dean Lerner Consulting

This session will examine findings from a report on the scope and severity of survey deficiencies for the inappropriate use of antipsychotic medications among nursing home residents. The presenters, who conducted the research and wrote the report, will discuss what level of harm regulators commonly assign to these deficiencies and the penalties typically imposed for such violations. They will also share their conclusions about whether or not regulators are sufficiently citing and enforcing penalties against the inappropriate use of these drugs.

Making Guardianship Work for Vulnerable Elders *Roanoke*

Presenters: Erica Wood, Assistant Director, American Bar Association (ABA), Commission on Law and Aging; Sally Hurme, Senior Project Manager, AARP

Too often guardianship does not work in the best interests of the individuals it is designed to protect. This session will explore the role of guardians and the rights of wards, as well as the key concerns presented in guardianship cases. It will highlight suggested reforms that could improve guardianship standards and practices at both the national and state levels, show how advocates can encourage change in guardianship policies and practices in their own states as well as how best to work with guardians to ensure the best interests of the wards.

Working with Today's Volunteers: How to Fully Utilize Their Skills While Minimizing Risk *Richmond*

Presenters: Tom Endres, Director, The Aging Network's Volunteer Collaborative (ANVC), National Association of Area Agencies on Aging (n4a); Rebecca Kinney, Senior Medicare Patrol (SMP) Program Manager, Administration for Community Living

Volunteerism is changing. People want meaningful volunteer experiences, but on their own terms and schedules. In order to benefit from the expertise of today's skilled volunteers, programs and organizations must be ready to fully engage and support these volunteers and limit risk as volunteer roles and responsibilities expand. Learn how to make sure your program is ready to work with these volunteers by decreasing and managing risk and explore innovative practices for recruiting and engaging today's volunteers.

saturday, october 26

3:15 p.m. – 3:30 p.m.

Break

3:30 p.m. – 4:45 p.m.

Breakout Sessions

Strategies for Successful Advocacy: Part II *Yorktown*

Presenter: Mike Splaine, Owner and Principal, Splaine Consulting

Part II of this session will focus on accessing and working with policymakers; the importance of collaborations - including between ombudsman programs and citizen advocates; and exploring the differences strategy based on whether your focus is legislative, regulatory, or another type of advocacy.

QAPI's Coming - Are you Ready? *Williamsburg*

Presenters: Debbie Lyons, Health Insurance Specialist, CMS Office of Clinical Standards and Quality, Survey & Certification Group, Division of Nursing Homes; Nancy Shaffer, State Long-Term Care Ombudsman, Connecticut State Long-Term Care Ombudsman Program; Kim Marheine, Ombudsman Services Supervisor, Wisconsin Board on Aging and Long-Term Care

CMS is gearing up for Quality Assurance and Performance Improvement (QAPI) in nursing homes – a way of doing business that is designed to provide person-centered care to nursing home residents. Hear from CMS about expectations related to QAPI implementation, including how it fits with state and federal initiatives. Ask questions and discuss what advocates can do.

Involuntary Transfer and Discharge: Hot Topic Issues - Ask the Experts!

Roanoke

Presenters: Eric Carlson, National Senior Citizens Law Center (NSCLC); Mary Ann Parker, Attorney, D.C. Long-Term Care Ombudsman Program

Discuss strategies and best practices for preventing and advocating for residents facing involuntary discharge from a nursing home. Consider how those strategies, best practices change/stay the same if the resident is in assisted living. Review best practices for supporting residents and families, identifying legal support, appealing discharge notices, and more.

Making the Most of Your Ombudsman Training Program *Richmond*

Presenters: Wayne Nelson, Professor and Director, Office of Collaborative Programs, Towson University, Maryland; Alia Murphy, Associate, Long-Term Care Ombudsman Program and Policy, National Consumer Voice for Quality Long-Term Care, National Ombudsman Resource Center

Discuss the when, why and how's of training techniques to prepare long-term care ombudsmen to be successful advocates. Learn how to select appropriate methodologies for your training goals including webinars, online modules, self-study and in-person. Participate in a discussion of ombudsman training innovations and resources, including the NORC online training modules. This session is for individuals who conduct training for ombudsmen.

saturday, october 26

5:00 p.m. - 5:45 p.m.

Consumer Voice Annual Business Meeting (Open to all conference participants) *Williamsburg*

Join the Governing Board, Leadership Council and Staff of the Consumer Voice to hear brief updates on the state of the organization, its operational and financial position, and policy and program initiatives.

6:00 p.m.

Dinner on Your Own

6:00 p.m. - 7:30 p.m.

Consumer Voice Governing Board Meeting (By invitation only) *Patrick Henry Executive Boardroom*

6:00 p.m. - 7:30 p.m.

Consumer Voice Leadership Council Meeting (By invitation only) *Yorktown*

sunday, october 27

7:00 a.m. – 9:00 a.m.

Registration Open *Virginia Ballroom Foyer*

8:00 a.m. – 9:00 a.m.

Hot Breakfast Provided by Consumer Voice *Madison/Adams*

9:00 a.m. – 12:00 p.m.



Plenary: Enhancing Well-Being in Older Adults Living with Dementia

Presenter: Dr. G. Allen Power, MD; Eden Mentor, St. John's Home, Rochester, NY; Clinical Associate Professor of Medicine at the University of Rochester.



The author of the best selling and award winning book, *Dementia Without Drugs*, Dr. Power, will share his time-tested strategies for engaging individuals with dementia in a meaningful way in order to provide compassionate, person-centered care without drugs.

Dr. Power is most recently an Eden Mentor at St. John's Home in Rochester, NY, and Clinical Associate Professor of Medicine at the University of Rochester. His book, *Dementia Beyond Drugs: Changing the Culture of Care* was released by Health Professions Press in February 2010. It won a 2010 Book of the Year Award from the American Journal of Nursing, a Merit Award from the 2011 National Mature Media Awards, and a must-have title in Doody's Core Titles list for 2013. He is a board-certified internist and geriatrician, and is a Fellow of the American College of Physicians/American Society for Internal Medicine. He has lectured on dementia and other elder care topics throughout the US and Canada, the United Kingdom, Denmark, Singapore and Malta. Dr. Power has been named one of 2013's "Five Leaders of Tomorrow" by Long-Term Living Magazine.

Dr. Power's presentation is FREE for individuals that register for the full conference and by ticket at the registration desk for any additional individuals who would like to attend just this session.

12:15 p.m.

Closing Remarks

12:30 p.m.

Conference Concludes

presenters' biographies

Jessica Brill Ortiz, MPA

Jessica Brill Ortiz is the National Advocacy Director with Direct Care Alliance (DCA), where she provides strategic leadership, implementation and support for DCA's policy, advocacy and organizing programs at the state and federal level. She works closely with constituents, policymakers and other advocates to advance DCA's policy agenda and ensure that direct care workers have opportunities to participate in policymaking decisions that affect them. Her work includes leading DCA's campaign in support of federal minimum wage and overtime protections for home care workers and implementation of the Affordable Care Act. Before joining DCA, Jessica managed and led key programs at the National Consumer Voice for Quality Long-Term Care (the Consumer Voice). She has Masters degrees in Public Administration and Political Science and an Advanced Certificate in Health Services Management and Policy from Syracuse University's Maxwell School of Citizenship and Public Affairs.

Regina Barnett

Regina Barnett is 51, bright eyed and brightens any room with her smile and beautiful hats. Born in Florida, she moved to the mid-Atlantic 13 years ago and began working with people with disabilities at a developmental disabilities day program provider. About four years ago, she was given an MS diagnosis. Soon she had significant disabilities. Her doctor said that it was the most aggressive MS she had ever seen. She went to a rehab hospital to try to maintain her independence and was eventually transferred to a nursing facility after her rehab benefits ran out and she still needed 24 hour a day care. However, Regina already knew the way out. Her occupational therapist in the rehab hospital had told her about the Maryland waiver programs and self-direction. She would be eligible for a Medicaid waiver once Medicaid was paying for her stay. Her long term care ombudsman helped her stay on track and helped her get home. Regina went home in September two years ago and has been helping other residents transition for the past year.

Bob Blancato

Bob Blancato is President of Matz Blancato and Associates, a firm providing a wide array of Washington representational services for clients. He is the National Coordinator of the 3000 member Elder Justice Coalition. He serves as Executive Director of the National Association of Nutrition and Aging Services Programs. Bob has more than 20 years of federal government service including 13 years on the senior staff of the House Select Committee on Aging and an appointment by President Clinton to be the

Executive Director of the 1995 White House Conference on Aging. Bob is currently on the Boards of the American Society on Aging and the National Council on Aging. He holds a BA from Georgetown University and an MPA from American University.

In December 2012, Bob was reappointed to the Commonwealth Council on Aging. In January 2013, Bob was selected to be the Volunteer State President of AARP in Virginia.

Brian Capshaw

Brian was born and raised in Newington Connecticut, with two sisters and a brother. He graduated Newington High School in 1980. After receiving a B. S. degree in accounting from Nichols College in Massachusetts 1984, Brian worked in Stamford, Connecticut as a cost accountant. In 1989 he accepted a job transfer to South Bend Indiana, where he received a masters degree from Indiana University in business administration. While working for Benteler Automotive, a car accident in 1994 left Brian paralyzed from the chest down, and he continued to work full time for a company called AM General makers of the military HUMVEE vehicle as a cost accounting supervisor. In 2006 health issues forced Brian to stop working, and in 2007 he returned to Connecticut to be with his family. Brian has been at Aurora Senior Living for 5 years and resident council president since November 2009. His goals as president are to resolve all resident concerns as quickly as possible holding administrative personnel to deadlines. Brian has been working with the administration on making our building a safe place to live for all residents. The resident council recently started an employee of the month program and to increase participation, members pass out flyers to residents with the agenda for the month and provide refreshments.

In 2010, Brian joined the Statewide Coalition of Presidents of Resident Councils, advocating on a statewide level for all of Connecticut nursing home residents. Working with the state ombudsman program, the coalition publishes a quarterly newsletter for all nursing homes and presents a legislative agenda each session, as well as meets with legislators and government officials. In October 2012, Brian joined the Consumer Voice Leadership Council, helping to advocate on a national level regarding issues related to long-term care.

Eric M. Carlson

Eric Carlson has broad experience in many forms of

long-term services and supports (LTSS), including home and community-based services, nursing facility care, and assisted living facilities. He led NSCLC's extensive research (funded through The Commonwealth Fund) on Medicaid-funded assisted living and currently is leading a project to assist consumer advocacy on Medicaid managed LTSS in Florida and New Jersey. He counsels attorneys from across the country and co-counsels litigation on consumers' behalf. Mr. Carlson serves as President of the national Assisted Living Consumer Alliance and is author of the legal treatise Long-Term Care Advocacy (Matthew Bender and Co.).

Anthony Chicotel, Esq.

Anthony Chicotel is a staff attorney for California Advocates for Nursing Home Reform. His expertise is in the rights of long-term care consumers, conservatorships, and health care decision making. Prior to coming to CANHR, Mr. Chicotel was a senior staff attorney for Elder Law & Advocacy's Nursing Home Rights Enforcement Project in San Diego. Mr. Chicotel received his J.D. from The Ohio State University College of Law and a Masters in Public Policy from U.C. Berkeley. He is an adjunct professor at U.C. Berkeley's School of Law and has written and lectured extensively about the rights of elderly Californians.

Jeff Crollard

Jeff Crollard of Crollard Law Office PLLC in Seattle, has been the attorney for the Washington State Long-Term Care Ombudsman Program since 1990. The Ombudsman Program in Washington is housed in a non-profit organization, completely independent of the state's licensing agency. Ombudsmen advocate for people living in nursing homes, assisted living facilities and adult family homes. Over the years, Jeff has participated extensively in state policy, regulatory, and legislative issues concerning vulnerable adults and residents of long-term care facilities, has written extensive exposé reports on behalf of the Ombudsman, and has helped to draft a number of the current state regulations and laws governing these facilities. He is a frequent trainer and CLE presenter. Jeff also is a private attorney who represents elderly and disabled residents of long-term care facilities who have been injured, abused, neglected, or suffered wrongful death, representing such clients across the state. Jeff is past chair of the state bar association's Elder Law Section, past co-chair of the state trial attorney association's Elder Abuse Section, and formerly served on the leadership council of Consumer Voice (formerly the National Citizens Coalition for Nursing

Home Reform). Jeff is a graduate of the University of Washington, and of the University of California, Berkeley, where he received a masters in public policy degree and law degree. Jeff grew up in Yakima, Washington and is a fourth generation Washingtonian. His grandfather, father, and son (in one year, Jeff proudly notes) are UW law school grads.

Alice Dembner

Alice Dembner leads Community Catalyst's work in the key areas of Medicaid managed care and long-term services and supports, and directs the Substance Use Disorders Project. That collective work seeks to improve access to quality, affordable health care and social supports for vulnerable people by reforming our health care system through direct advocacy in Washington and technical assistance to state organizations nationwide. As a member of Community Catalyst's health equity team, Alice also works to incorporate health equity advocacy into all of Community Catalyst's projects and to advance the involvement of people of color and immigrants in health advocacy. Alice also provides direct policy support on all aspects of health reform as part of Community Catalyst's policy team. Previously, Alice served as deputy policy director.

Alice's background is in investigative and analytic journalism. During 30 years as a reporter and editor, she informed policymakers, influenced public opinion and spurred change. She won national awards for her health coverage at The Boston Globe, which focused on gaps in care for the uninsured, seniors and children with mental illness. As an editor, she also supervised coverage of science, environment and education. She has also founded and run volunteer programs to improve the health and well-being of women, minorities and people with AIDS. She holds a bachelor's degree from Yale University, magna cum laude.

Patty Ducayet

Patty Ducayet is a Licensed Master Social Worker. She became the Texas 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 people living in long-term care. 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, and also served 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.

Ms. Ducayet 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.

Toby S. Edelman

Toby Edelman is a Senior Policy attorney in the Washington, DC office of the Center for Medicare Advocacy. She has advocated on behalf of nursing home residents since 1977. From 1977 through 1999 she was a staff attorney with the National Senior Citizens Law Center in Washington, DC, where she was involved in the development and drafting of the nursing home reform law that was enacted by Congress in December 1987. Active in the law's implementation, she has represented residents in a variety of task forces and workgroups convened by the Health Care Financing Administration (now the Centers for Medicare & Medicaid Services) to address survey issues and enforcement of federal standards for nursing facilities.

Ms. Edelman was the lead attorney for plaintiffs in *Valdivia v. California Department of Health Services*, the case in which a statewide class of nursing facility residents successfully challenged California's refusal to implement the federal nursing home reform law in October 1990. From 1997-1998, she coordinated a study, supported by the Commonwealth Fund of New York, regarding implementation of the enforcement provisions of the nursing home reform law at the federal level and in five states.

Ms. Edelman received an A.B. from Barnard College, an Ed.M. from the Harvard Graduate School of Education, and a J.D. from the Georgetown University Law Center. She is also a member of Consumer Voice's Leadership Council.

Tom Endres

Tom is recognized nationally for his leadership in government and the nonprofit sector related to National and Community Service. He is known building trust and for achieving results in complex and politically sensitive work environments. Through his visionary, strategic, and participatory leadership style, Tom has created, implemented, and operated national and community-based service programs with documented success. He is

currently the Director of The Aging Network's Volunteer Collaborative and recently served as the Vice President, Civic Engagement, National Council on Aging (NCOA).

Jonathan Evans, MD, CMD

Jonathan Evans MD, MPH, CMD is President of AMDA. 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. 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.

Wendy Fox-Grage, M.S.G., M.P.A

Wendy Fox-Grage has provided policy research, analysis and guidance for the AARP Public Policy Institute since 2004. Her areas of focus are state long-term services and supports reforms, and Medicaid home and community-based services. Prior to AARP, she worked for the National Conference of State Legislatures for nine years, advising state legislators and legislative staff on issues related to long-term services and supports.

Ms. Fox-Grage started her career in public policy as a congressional intern with the U.S. Senate Special Committee on Aging. She holds a Master of Science in Gerontology and a Master of Public Administration from the University of Southern California's Andrus Gerontology Center. Wendy and her husband have three school-aged children, and Wendy can always be spotted around the house with a paint roller in hand.

Fay Gordon

Fay Gordon is a staff attorney with the National Senior Citizens Law Center. She is part of NSCLC's Health Care team where she works on federal policy and advocacy for individuals who are dually eligible for Medicare and Medicaid benefits. Before joining NSCLC, she was the senior public policy associate at Limited to Lindberg, LLC where she worked on aging issues on behalf of the National Academy of Elder Law Attorneys. Fay has worked for Frank, Frank & Scherr, an elder law firm, and earned her JD from the University of Maryland. She is a member of the Maryland Bar.

Yvette Green

Yvette Green is resident of a long-term care facility in Philadelphia. She lives at Inglis House, which is a residential 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 three years and has been living in her current residence for eight years. Since there, she has completed a college degree.

Kathy Greenlee

Kathy Greenlee serves in the dual roles of Administrator of the Administration for Community Living and Assistant Secretary for Aging. Ms. Greenlee was appointed by President Obama as Assistant Secretary for Aging at the U.S. Department of Health and Human Services and confirmed by the Senate in June 2009.

The Administration for Community Living (ACL) is a new federal agency operating within the Department of Health and Human Services. ACL brings together into a single entity the Administration on Aging, the Office on Disability, and the Administration on Developmental Disabilities. ACL is charged with working with states, tribes, community providers, universities, nonprofit organizations, businesses and families to help seniors and people with disabilities live in their homes and fully participate in their communities.

Kathy Greenlee served as Secretary of Aging in Kansas, and before that as the Kansas State Long Term Care Ombudsman. She also served as the General Counsel of the Kansas Insurance Department and served as Chief of Staff and Chief of Operations for then-Governor Kathleen Sebelius.

Ms. Greenlee is a graduate of the University of Kansas with degrees in business administration and law.

Catherine Hawes

Catherine Hawes, Ph.D., is a Regents Professor in the School of Public Health at Texas A&M University. She has devoted her 34 year career to research, teaching, advocacy and policy-making in long-term care. During this time she worked for the US Senate Special Committee on Aging, was Executive Director of the Ohio General Assembly's Nursing Home Commission, helping ensure the passage of the first residents' bill of rights in Ohio and an omnibus reform bill. After a brief foray at Duke, she moved to RTI where she led more than 20 research projects in LTC. These included leading the team that developed the MDS/RAI,

heading a study of the effect of regulation on board and home quality, and leading the first national study of assisted living for the frail elderly.

At Texas A&M, her research has largely focused on detecting and preventing elder abuse in residential LTC settings in studies for the NIA and NIJ. Her publications have been among the most highly cited in the world (among the top .05% of social scientists). More important, throughout her career, she has -- at the urging and with the help and inspiration of Elma Holder, Barbara Frank, and Toby Edelman -- sought to use her research findings to inform LTC policy. She has testified before the Congress eight times as an expert and served on the Institute of Medicine's Nursing Home Committee, with recommendations that were largely adopted by Congress as the OBRA 1987 nursing home reforms. She also recently appeared on the Frontline special, "Life and Death in Assisted Living."

Esther Houser

Esther Houser has served as the State Long-Term Care Ombudsman in the Aging Services Division of the Department of Human Services since 1979. She holds a Bachelor's Degree in Social Work from the University of Oklahoma and a Master of Science in Social Work degree from the University of Texas at Austin. Ms. Houser has served two terms as President of the National Association of State Long-Term Care Ombudsman Programs. Her work has been published in Long Term Care and the Law (1983), The Oklahoma Bar Journal (1994), and various other publications and manuals related to Ombudsman practice and long-term care issues. In 2003, the Oklahoma Commission on the Status of Women inducted Ms. Houser into the Oklahoma Women's Hall of Fame, in recognition of her advocacy on behalf of elder residents in long-term care facilities. She was a charter member of the Board of Directors of Oklahoma Court Appointed Advocates for Vulnerable Adults (OCAAVA), and has served as Conservation Chair for the Oklahoma Chapter of the Sierra Club.

Patricia L. Hunter, MSW

Patricia is the Washington State Long-Term Care Ombudsman (LTCOP). Since September of 2011, Patricia directs the statewide LTC Ombudsman Program. The mission of the LTCOP is to ensure the rights, dignity and well-being of individuals who live in long-term care settings. Patricia's role is to work with consumers, state agencies, and legislators to establish policy and systems

advocacy efforts to improve the quality of care and life for individuals living in nursing homes, assisted living facilities and adult family homes. She is a social worker specializing in eldercare field and working with older adults with memory loss and their families for over 16 years.

Prior to working for the State LTCO Program, Patricia worked in program and policy development at the Alzheimer's Association, Western and Central Washington State Chapter. Patricia received her Bachelor's degree in Business Administration from Central Washington State University and a Master's degree in Social Work from the University of Washington. She is also a graduate of Leadership Tomorrow, Class of 2008.

Sally Balch Hurme, JD

Sally Hurme is currently a Project Advisor with the AARP Health Education team explaining the workings of the Affordable Care Act and the Health Insurance Marketplaces. While at AARP she has worked on a wide variety of issues including fraud, elder abuse, financial exploitation, guardianship, and advance care planning. Ms. Hurme was honored by the National College of Probate Judges with the Treat Award for excellence in probate law. As chair of the National Guardianship Network she led the planning for the 2011 Third National Guardianship Summit. Hurme is the convener of the 3rd World Congress on Guardianship to be held in Washington, DC in May 2014. She was an advisor to the Uniform Law Commission in the drafting of the uniform guardianship jurisdiction act. Hurme also was a member of the US State Department delegation that drafted the Hague International Convention on the Protection of Adults.

Ms. Hurme is a well-recognized media spokesperson on elder law issues in addition to lecturing in Australia, Italy, Spain, Czech Republic, England, Moldova, Netherlands, and Japan. She has authored 18 law review articles and 4 book chapters on various elder law issues and taught elder law at George Washington University Law School. She is the author of The ABA Checklist for Family Heirs and is writing a second ABA/AARP Checklist for Survivors.

She received her law degree cum laude from the Washington College of Law at American University and is a long-standing member of the National Academy of Elder Law Attorneys.

Morris Kaplan

Morris is the Operating Partner of the Gwynedd Square Center for Nursing & Convalescent Care in Lansdale, PA. He pioneered the nationally recognized Alzheimer's Special Care Program at Gwynedd Square Nursing Center in Lansdale, PA. This program was designated as a "Model Program for Alzheimer's Care" by the national Alzheimer's Association in 1993. Gwynedd Square was one of only ten of Pennsylvania's 700-plus nursing homes to be designated by the PA Department of Health as a Model of Best Practices in February 2002. Gwynedd Square was also honored as a 2002 PA Governor's Silver & Gold Award Finalist for Quality of Life in Long Term Care. The PA Patient Safety Authority has recognized Gwynedd Square as a best practices leader in two different areas in 2011 and 2010. Gwynedd Square has consistently earned the highest rating from the US Department of Health & Human Services, 5 stars out of 5 stars (given to less than 10% of all nursing homes). Gwynedd Square has also been honored by US News & World Report as one of America's Best Nursing Homes 2013, 2012 and 2011 (awarded to less than 2,000 out of 16,000 nursing homes). Gwynedd Square has in the past been selected as a study site for best practice research by the Office of Inspector General, US Dept. of Health & Human Services, and Centers for Medicare & Medicaid Services.

Morris served for more than a decade as a Board Member of the Alzheimer's Association, Delaware Valley Chapter (Southeastern PA, Southern NJ & DE). He has made numerous presentations at Alzheimer's Association conferences (local and national) and has testified on behalf of the Association in the Pennsylvania legislature. Morris is also an active member of Consumer Voice, formerly NCCNHR, and has made many presentations at Consumer Voice annual conferences. He also testified about nursing home issues before a US Senate panel convened by the late Sen. Edward Kennedy.

Linda Kincaid, MPH

Linda Kincaid obtained her Master of Public Health from UC Berkeley. She has been a chemical safety consultant to high tech companies in Silicon Valley since 1990. She was a Certified Industrial Hygienist from 2006-2010, when her mother became a victim of abuse. Linda is now an active advocate for elder rights. She was instrumental developing California legislation to clarify rights of conservatees, and she was an invited speaker before the California Senate Judiciary Committee. Linda currently devotes much of her time to advocacy and speaking on elder issues throughout the country.

Rebecca Kinney

As an SMP Program Manager for the Administration for Community Living (ACL) Rebecca is responsible for the administration of the national Senior Medicare Patrol (SMP) program. She provides oversight and direction to the ACL project officers, the grantees and the SMP Resource Center to ensure that everyone is communicating effectively and moving in the same direction. Along with that Rebecca is involved with establishing and maintaining partnerships on the national level with other federal agencies, such as the Health and Human Services Office of Inspector General (OIG) and the Centers for Medicare and Medicaid Services (CMS). In her previous role as the Trainer for the Michigan Medicare/Medicaid Assistance Program (MMAP), Rebecca was responsible for the education and certification of the volunteers statewide. In that role she became known for her expertise on both Medicare and Michigan Medicaid. Rebecca acquired her Master of Social Work with a focus in aging and management in 2006 from the University of Michigan where she was also a Geriatric Fellow. She also holds a Bachelor of Fine Arts with a focus in drawing and painting from Alma College. In addition Rebecca holds a Michigan Master of Social Work license.

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 for Community Living. In this capacity, she promotes effective State Long-Term Care Ombudsman Programs that serve 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.

Kathryn Lanier

Kathryn Lanier is the Section Chief for Elder Rights and Special Initiatives at the North Carolina Division of Aging and Adult Services. She oversees the Long Term Care

Ombudsman Program, Legal Services for the Elderly, the Senior Community Service Employment Program, and Consumer Fraud Protection efforts. Prior to her current position, she served as the Ombudsman Program Specialist for ten years with the Division.

She is the founder of Strategic Alliances for Elders in Long Term Care, aka, S.A.F.E. in-LTC which is a multidisciplinary taskforce comprised of concerned individuals committed to identifying and addressing crimes that occur in long term care facilities. Ms. Lanier served as Chair of the Taskforce for its first ten years and under her leadership and the dedication of its members created a three day training curriculum for law enforcement officers, who typically have achieved the rank of deceive called "Investigating Crimes in Long Term Care Facilities: Voiceless Victims" In addition to Voiceless they also created a half-day training course designed to meet the needs of long term care providers entitled "Staying on the Right Side of the Law." She has over 18 years of experience in the field of aging services and has developed and presented training to professionals and the public on a wide variety of topics ranging from advocacy to elder abuse prevention. She earned her MS in Gerontology with a concentration in Public Administration from the Medical College of Virginia/Virginia Commonwealth University and a BA in Broadcast Electronic Communication from Marquette University.

Beverley Laubert

Beverley Laubert has been an ombudsman for twenty-six years, including nineteen 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 School of Public Policy and Management, 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 and her husband Michael co-authored "Safety, Self-Determination, and Choice in Long-Term Care: The Consumer and Ombudsman Experience" for the Ethics, Law, and Aging Review. Beverley is the President of the National Association of State Long-Term Care Ombudsman

Programs.

Beverly held two terms as President of the National Association of State Long-Term Care Ombudsman Programs. She is a member of the Leadership Council of the National Consumer Voice for Quality Long-Term Care, and is Vice-Chair of the Board of the national Advancing Excellence in Long-Term Care Collaborative.

Dean Lerner

Dean Lerner is an attorney-consultant to CMS, the Division of Nursing Homes, Survey and Certification Group. From 2007-2011, he was a cabinet level gubernatorial appointee, Director of the Iowa Department of Inspections and Appeals (Department). Among many other responsibilities, this Senate confirmation appointment included oversight of the State Survey Agency. Before this appointment, Mr. Lerner served for nearly a decade as the Department's Deputy Director and as Iowa's Chief Deputy Secretary of State. Mr. Lerner also served for 16 years as an Iowa Assistant Attorney General, litigating/prosecuting civil rights, environmental protection, consumer protection, tort claims, and a host of other cases on behalf of the State. Now "retired" after 30 years of Iowa public service, Mr. Lerner consults and advises clients, including CMS, instructs the CMS Survey Agency Director Orientation Course, serves as an expert witness, and advocates for nursing home reform, the disability community, and other causes. Mr. Lerner serves on the Leadership Council of the National Consumer Voice, is a "Featured Writer" for the Des Moines Register, and contributes to various other Iowa newspapers.

Debra Lyons, R.N.

Debra Lyons has been a Registered Nurse since 1998. She began her nursing career as a staff/charge nurse at Springfield State Hospital Center for acutely ill psychiatric patients. She continued at Springfield Hospital, where she became Head Nurse on a busy admission unit. In 2003, Ms. Lyons joined the Maryland State Office of Health Care Quality, where she was a Nurse Surveyor for LTC, Basic Hospital, and Transplant Hospital. From 2006 through 2008, she provided technical assistance to Maryland nursing homes in the area of Quality Assurance. Ms. Lyons came to CMS on July 18th, 2010 as a Health Insurance Specialist with the Division of Nursing Homes, within the Survey and Certification Group. She is the project lead for Nursing Home Quality Assurance & Performance Improvement.

Gail MacInnes

Gail MacInnes is PHI's National Policy Analyst. She is responsible for analysis, writing and advocacy on issues affecting the direct care workforce with the goal of influencing national policies affecting the quality of direct care jobs and the quality of care for long-term care consumers. Gail has over 10 years of policy analysis and advocacy experience focused on aging and long-term care issues. Prior to joining PHI, she worked as a public policy consultant on health care, long-term care and care coordination policy for the Social Work Leadership Institute of the New York Academy of Medicine and the National Academy of Elder Law Attorneys. For two years, she organized older adults to participate in public policy advocacy in Milwaukee, WI with Coalition of Wisconsin Aging Groups. She also spent a number years working with the National Consumer Voice for Quality Long-Term Care to train family members of nursing home residents on how to advocate for improved quality of care within facilities. Gail holds a master's degree in social work from the University of Maryland at Baltimore and a bachelor's degree in International Studies from University of Richmond.

Andy Mao

Andy Mao is the Senior Counsel for Health Care Fraud and Elder Justice in the Civil Fraud Section, Department of Justice. Mr. Mao represents the Civil Division on policy matters relating to health care fraud and coordinates Department-wide activities relating to elder abuse, neglect and exploitation. Mr. Mao is a graduate of Cornell University and the University of Virginia School of Law.

Kim Marheine

Kim Marheine holds a bachelors degree in music therapy and a masters degree in Community/Agency Counseling, both from UW-Oshkosh, where she also taught in the Music Therapy Division. Kim has worked extensively in the area of long term care, first as a long term care provider for 20+ years, then as Program Director for the Alzheimer's Association of Greater WI, and currently as Ombudsman Services Supervisor for the State of Wisconsin Board on Aging and Long Term Care. At the national level, Kim served on several committees of the Alzheimer's Association, primarily structured around staff development, client supports, and family caregiver support. Kim has been a frequent presenter on both state and national levels, speaking on a wide array of topics related to maturing adults.

Melanie S. McNeil, Esq.

Melanie McNeil is the Georgia State Long-Term Care Ombudsman. Prior to taking on the role of State Long-Term Care Ombudsman, she was the Manager of Medicaid and Special Populations for Kaiser Permanente in Georgia. Melanie came to Kaiser Permanente from the National Association of State Units on Aging in Washington, D.C. where she was the Director of Public Policy helping to shape federal policy on behalf of the 56 state and territory units on aging. Before moving to Washington, she spent ten years with the Georgia Council on Aging advocating on behalf of older adults with the executive and legislative branches in Georgia.

An honors graduate of Western Illinois University and a cum laude graduate of Georgia State University College of Law, Melanie is admitted to practice law in Georgia and Colorado.

Dr. Pooja Mehta

Dr. Mehta is an obstetrician/gynecologist and a Robert Wood Johnson Clinical Scholar at the University of Pennsylvania. She is especially interested in the effects of health care reform on reproductive health disparities affecting particularly marginalized populations. She presents at the Consumer Voice Conference as part of a partnership between the Robert Wood Johnson Clinical Scholars Program, Inglis House, and the Center for Advocacy for the Rights and Interests of the Elderly. She is a believer in community-based participatory research as a tool for social justice and policy change.

Linda Merkle

Linda Merkle, age 60, is a lifelong Marylander and has been home from a nursing facility for nearly ten years. Linda had a stroke at 45 and had no way to take care of herself in the community. She had never met anyone who was in a wheelchair who lived in the community and didn't know it could be done. After she met a representative from the state protection and advocacy system, MDLC, she decided she would find a home and get the help she needed to live independently and help others find their way home. Linda has been helping people transition from nursing facilities for the past ten years, even before she went home herself, and has been an activist for paratransit rights, housing, and for the right to live one's own life in one's own home.

H. Wayne Nelson, Ph.D.

H. Wayne Nelson Jr., Ph.D. is Professor and Director of Towson University's Office of Collaborative Programs,

College of Health Professions. He also directs the Undergraduate Health Care Management program. He teaches leadership, advocacy, and elder-rights related courses mostly at the graduate level. Dr. Nelson is a Fellow of the Gerontological Society of America. From 1983-1985 he was a personal assistant to Oregon's Governor Victor Atiyeh and transitioned the Long-Term Care Ombudsman Program from the Governor's Office to an Independent State Agency where he remained until 1998. His research interests include the Ombudsman program and disaster readiness for special needs populations. He has published dozens of articles in leading scientific journals and has co-authored one book on elder advocacy and many book chapters and encyclopedia entries relating to the LTC Ombudsman program and long-term care.

Victor Orija

After 25 years in the chemical industry, Victor joined the state government in 2002. He worked in contract management, and administered the nursing home transition program. In January 2006, he became the State Long Term Care Ombudsman. Victor serves on various statewide committees that are involved in systems change for the aged and persons with physical disabilities. He is an active member of the National Association of State Long Term Care Ombudsmen Programs (NASOP) of which he's currently the Region 3 Director. He's a past recipient of the Golden Apple Award from Delaware's Quality Insight. Victor received a BS from the University of Delaware, a Master's from the University of North Carolina (Charlotte), and attended John Marshall Law School in Atlanta.

Gwen Orłowski

Gwen Orłowski recently joined the National Senior Citizens Law Center as a Senior Staff Attorney. Prior to that, she was the Chief Section Counsel and Supervising Attorney in the Senior Legal Rights Project at Legal Services of New Jersey. Previously, she was at LSNJ from 2002 until 2007, where she supervised both the Senior Legal Rights Project and the Anti-Predatory Lending Project. From 2007 until 2010, Gwen served as the Director of Elder Advocacy and Director of Advocacy for People with Developmental Disabilities at New Jersey's Department of the Public Advocate until it was dissolved. In 2010, Gwen served as New Jersey's State Long Term Care Ombudsman. She has a 1990 law degree from Rutgers School of Law – Newark, and graduated from Georgetown University in 1985 with an AB in Government.

Héctor L. Ortiz, Ph.D.

Héctor L. Ortiz is Policy Analyst at the Office for Older Americans of the Consumer Financial Protection Bureau where he works on issues related to retirement security, and provides research and data analysis support to the Office. Previously, Héctor was a Senior Program Associate at the Center for Benefits of the National Council on Aging, where he collected and analyzed data on benefits outreach and enrollment initiatives targeted at low-income seniors. Prior to joining NCOA, Mr. Ortiz worked with the National Long-Term Care Ombudsman Resource Center and interned at the Congressional Research Service. Héctor is a graduate of Syracuse University.

Mary Ann B. Parker

Mary Ann Parker is the attorney for the D.C. Long-Term Care Ombudsman Program/Legal Counsel for the Elderly. Ms. Parker began her legal career over 25 years ago in private practice in Maryland. However, she has been involved with legal concerns facing DC's seniors for approximately 20 years. For over seven years, Ms. Parker has provided legal representation to residents of DC's Long Term Care Facilities. Ms. Parker has conducted legal trainings and presentations on a variety of legal issues including advance directives, long-term care planning, public benefits and residents' rights. Ms. Parker received her BS in Journalism from West Virginia University and her J.D. from American University, The Washington College of Law. Ms. Parker was the recipient of the 2009 Toby S. Edleman Legal Justice Award for extraordinary efforts to achieve justice for long-term care consumers.

Lynne Person

Lynne Person was appointed as the DC Long-Term Care Ombudsman in August 2010. She has worked with adults and people with development disabilities for more than 25 years. Lynne began her career as a job coach for adults with disabilities shortly after completing her undergraduate in Psychology at Howard University. She has enjoyed serving in the capacity QMRP/Program Director, QI Consultant, NJ State Director (VOCA), Health Insurance Specialist (CMS/ICF/MR Program), Licensing Director, Administrator and Interim Deputy Director at the DC Department of Mental Health. Lynne is currently working on her dissertation towards a Doctorate in Educational Leadership. She received a MS in Management from Thomas Edison State College and attended the Howard School of Divinity toward a Masters in Religious Studies. She is a native Washingtonian and currently resides in the District of Columbia with her husband and two sons.

Lynne is very passionate about and committed to the work and mission of the DC Long-Term Care Ombudsman Program, most importantly the residents being served.

Heather M. Porreca

Heather Porreca has been a Long-Term Care Ombudsman with the Denver Regional Council of Governments since 2006. As a Long-Term Care Ombudsman she advocates for the residents in Assisted Living Residences and assists in empowering and educating residents. Prior to becoming an Ombudsman, Ms. Porreca worked as a HCBS case manager for both Denver and Jefferson Counties. She also worked as a Community Relations Specialist for the local PACE Program. Ms. Porreca received her bachelor's degree in sociology from the University of Northern Colorado and went on to receive a certificate as a Paralegal.

Dr. G. Allen Power, MD

The author of the best selling and award winning book, *Dementia Without Drugs*, Dr. Power, will share his time-tested strategies for engaging individuals with dementia in a meaningful way in order to provide compassionate, person-centered care without drugs.

Dr. Power is most recently an Eden Mentor at St. John's Home in Rochester, NY, and Clinical Associate Professor of Medicine at the University of Rochester. His book, *Dementia beyond Drugs: Changing the Culture of Care* was released by Health Professions Press in February 2010. It won a 2010 Book of the Year Award from the American Journal of Nursing, a Merit Award from the 2011 National Mature Media Awards, and a must-have title in Doody's Core Titles list for 2013. He is a board certified internist and geriatrician, and is a Fellow of the American College of Physicians / American Society for Internal Medicine. He has lectured on dementia and other elder care topics throughout the US and Canada, the UK, Denmark, Singapore and Malta. Dr. Power has been named one of 2013's "Five Leaders of Tomorrow" by Long-Term Living Magazine!

Louise Ryan, M.P.A.

Louise currently serves as Ombudsman Program Specialist for the U.S. Administration on Aging. Her primary duties include providing technical support to states on LTC Ombudsman data collection, training, and assistance with policy interpretation of the Older American's Act as it relates to the operations of LTC Ombudsman Programs. Prior her move to AoA Louise was the Washington State Long-Term Care Ombudsman for nearly five years after having served as the Assistant State LTC Ombudsman

for nine years. She had responsibility for the statewide LTC Ombudsman Program, all its staff and contractors including a corps of four hundred certified volunteer ombudsmen. Louise's previous work focused on establishing ombudsman program policy and promoting systems advocacy by working with state agencies and with the legislature to promote legislation improving the quality of care/life for residents.

Joseph Rodrigues

Governor Gray Davis appointed Joseph Rodrigues to the position of California State Long-Term Care Ombudsman in August 2002. As the State Long-Term Care Ombudsman, Mr. Rodrigues oversees 35 local Ombudsman programs, with approximately 1,100 certified Ombudsmen who have a regular presence in more than 1,200 skilled nursing facilities and almost 8,000 residential care facilities for the elderly. Mr. Rodrigues has an extensive background in working with elders and adults with disabilities. He has worked in the human services, aging, and long-term care system for more than 25 years.

Prior to his appointment as State Long-Term Care Ombudsman, Mr. Rodrigues was the Assistant Director of the Alameda County Area Agency on Aging, where he was responsible for the planning, developing, and coordinating of social services for elders in his community. Before working for the County of Alameda, Rodrigues was the Executive Director of St. Peter's Community Adult Day Care Center in San Leandro; the first licensed Adult Day Support Center in the county. Rodrigues has been a lecturer in gerontology at the California State University, Hayward and is on the faculty of Gerontology Program of the California State University, Sacramento.

Mr. Rodrigues is the current President of the National Association of State Long-Term Care Ombudsman Programs, and is a member of the American Society on Aging and Sigma Phi Omega, the national academic honor and professional society in gerontology. Rodrigues earned a Bachelor of Arts degree in Philosophy from St. Patrick's College in Mountain View, California in 1981 and in 1985, 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.

Lisa Weintraub Schifferle, J.D.

Lisa Weintraub Schifferle is an attorney in the Federal Trade Commission's Division of Privacy and Identity Protection. At the FTC, she serves on the Identity Theft

Team, in addition to handling data breach and privacy investigations. She regularly speaks on identity theft issues, training advocates across the country about how to assist identity theft victims. Before arriving at the FTC, Ms. Schifferle spent eight years at the Maryland Legal Aid Bureau, as a Staff Attorney and Supervising Attorney. Prior to that, she served as a law clerk to the Honorable Ronna Lee Beck. She received her B.A., summa cum laude, from Yale College and her J.D. from the University of Virginia Law School.

Nancy Shaffer, M.A.

Ms. Shaffer holds a Bachelor's degree in Sociology and a Master's degree in Human Development/Gerontology from St. Joseph College, West Hartford, Connecticut. She interned at The Institute of Living, Hartford, CT, and developed a Living History Program for elders with mental illness. Prior to becoming the Connecticut State Ombudsman, Ms. Shaffer worked with elders and disabled individuals in the long term care setting for twenty years. She served in a variety of roles, including Therapeutic Recreation Director, Director of Social Services and Director of Admissions and Marketing. Ms. Shaffer has been dedicated to improving the quality of life and care for long term care residents throughout her professional career. During her tenure as the CT State Ombudsman, Ms. Shaffer has been dedicated to the study and understanding of fear of retaliation for nursing home residents. This multi-year project resulted in a training program including a DVD and curriculum which has become a standard in Connecticut nursing facilities for promoting awareness and education for staff as well as residents and their families. Nancy is proud that the 2013 Connecticut General Assembly legislated that nursing home staff must now receive annual training about Fear of Retaliation and what that feels like for residents.

Michael Splaine

Michael Splaine is owner and principal in Splaine Consulting, a small advocacy and government affairs consulting firm based in Washington DC. Immediately prior to starting this company, Mike was Director of State Government Affairs in the Public Policy Division of the Alzheimer's Association, leading its grassroots network to accomplish state policy priorities, including comprehensive state Alzheimer Plans. While at the Association Mike was a staff team member for the Association's Early Stage Initiative (a program working to promote inclusion and programs for persons with Alzheimer's.) and provided leadership in the Association on the government affairs

aspects of the Healthy Brain Initiative, a cooperative agreement with CDC, and continues this work as a consultant to the Association.

Well known as an advocacy trainer and grassroots organizer, Mike has also been faculty for Alzheimer's Disease International Alzheimer University Public Policy and was coordinator of the last three. He is active with ADI's World Health Organization strategy group and is now advancing its policy agenda with UN based opportunities in New York and Geneva.

Mike is also CEO of a new company called Cognitive Solutions, LLC, a specialized consultancy to hospitals on their care of persons with dementia and other cognitive impairment. He makes his home in Columbia, Maryland with his amazing wife Sandy, enjoying occasional inspirational visits from his three daughters and granddaughter.

Joy Nathan Stern

Joy Nathan Stern has lived in Washington, DC for more than 40 years. A graduate of New York's Professional Children's School and Barnard College, she works as an actor in film, television, and theater—and portrays expert witnesses for law firm training programs. Joy and husband Carl have twin sons and one grandson.

In late 2010, when Joy brought her mother, Elizabeth Nathan, to the Health Care unit of The Methodist Home of D.C., it was with the agreement Elizabeth would be provided with the oxygen she required 24/7. However, during her six month residency, there were repeated incidents of oxygen deprivation, ending in her death. Vigorous efforts by Joy, with the assistance of the D.C. Ombudsman's Office for Long-Term Care, to convince the Methodist Home and the D.C. Department of Health to adopt measures to prevent such harm from occurring again have been rebuffed.

Mary Twomey, MSW

Mary Twomey, MSW is the Co-Director of the National Center on Elder Abuse and the Center of Excellence on Elder Abuse and Neglect at the University of California, Irvine. Before coming to UCI, Mary was director of the San Francisco Consortium for Elder Abuse Prevention, at the Institute on Aging (2000-2007). Earlier, Mary worked at the American Association of Retired Persons in Washington, DC for 11 years.

Lori Walsh

Lori, originally from Massachusetts, began her work with CARIE, the Center for Advocacy for the Rights and Interests of the Elderly, in 1997 as a long term care ombudsman complaint handler. She is currently the Program Manager, responsible for managing CARIE's long term care ombudsman program and the CARIE LINE, a phone and e-mail based counseling service that uses a unique self-help model to identify the needs of seniors and connect them to programs in their communities. She also manages CARIE's social media on both Facebook and Twitter, is the agency's videographer, and assists with CARIE's fundraising events. She enjoys choreographing dance for community theatre during her spare time and loves long distance bike riding.

Karla Warren

Karla Warren serves as Ohio's Legal Services Developer and is a certified long-term care ombudsman. She leads the Ohio Department of Aging's efforts in prevention of abuse, neglect, and exploitation as a member of the Ohio Attorney General's Elder Abuse Commission and an education subcommittee participant with the Ohio Coalition for Adult Protective Services. She leads the Office of the State Long-Term Care Ombudsman's development of the MyCare Ohio Ombudsman Demonstration and manages multiple grant projects. Karla is a member of the Boards of the Ohio Person-Centered Care Coalition and Community Mediation Services of Central Ohio. She was previously the Department of Aging's Deputy Director overseeing the Communications Division and in that role led public relations and crafted legislative testimony. Early in her career, Karla served as Press Secretary and Senior Communications Specialist for the Ohio Department of Education and the American Red Cross, respectively. She holds a Bachelor of Science in Journalism and studied business and political science at Ohio University.

Erica F. Wood, J.D.

Erica Wood is assistant director of the ABA Commission on Law and Aging. She has been associated with the Commission since 1980, where she has worked primarily on issues concerning adult guardianship, legal services delivery, dispute resolution, health and long-term care, and access to court. She has participated in national studies on public guardianship and guardianship monitoring; and played a role in convening national consensus conferences on guardianship. Prior to 1980, she served as staff attorney at Legal Research and Services for the Elderly, National Council of Senior Citizens. Ms. Wood

is a member of the Virginia State Bar. She served on the Virginia Public Guardian and Conservator Advisory Board and the Commonwealth Council on Aging. She chaired the Arlington County Commission on Long-Term Care Residences; currently serves on the Arlington Commission on Aging, and served for over 20 years as legislative chair of the Northern Virginia Aging Network. Ms. Wood received her B.A. from the University of Michigan and her J.D. from the George Washington University.



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