



# 2025 State Long-Term Care Ombudsman Conference Agenda

## Monday, April 28

8:45am – 5:00pm	Registration
9:00am – 12:00pm	<b>NASOP Committees</b> <i>Lighthouse Ballroom A</i>
12:00pm – 1:30pm	Lunch on Your Own
1:30pm – 5:00pm	<b>NASOP Membership Meeting</b> <i>Lighthouse Ballroom A</i>
1:30pm – 5:00pm	<b>State Staff Session</b> <i>Lighthouse Ballroom B</i>

*Speakers: **Katie O’Hearn**, Program and Outreach Manager, NORC; **Diandra Taylor**, Development Manager, Florida Long-Term Care Ombudsman Program; **Carol Scott**, LTC Ombudsman Program & Policy Manager, NORC; **Sam Brooks**, Public Policy Director, Consumer Voice; **Anthony Fullbright**, Deputy State Ombudsman, Oklahoma*

## Tuesday, April 29

8:00am – 5:00pm	Registration
7:30am – 8:00am	<b>New State Ombudsman Breakfast</b> <i>Lighthouse Ballroom A</i>
8:00am – 12:00pm	<b>New State Ombudsman Orientation</b> <i>Lighthouse Ballroom A</i>

*Speakers: **Carol Scott**, LTC Ombudsman Program & Policy Manager, NORC; **Lori Smetanka**, Executive Director, Consumer Voice; **Sam Brooks**, Director, Public Policy, Consumer Voice; **Amity Overall-Laib**, Director, NORC; **Beverley Laubert**, National Ombudsman Program Coordinator, Administration for Community Living (ACL); **Kristin Helfer Koester**, Medicare Program Associate, Advancing States; and **Alianne Sipes**, Utah State Ombudsman*

10:00am – 12:00pm	<b>Dialogue for Experienced State Ombudsmen</b> <i>Cumberland Room</i>
10:00am – 12:00pm	<b>Dialogue for State Staff</b> <i>Lighthouse Ballroom B</i>
12:00pm – 1:30pm	Lunch on Your Own
1:30pm – 2:00pm	<b>Welcome, Introductions, Opening Remarks</b> <i>Lighthouse Ballroom A</i>



*Speaker: **Paul Saucier**, Director, Office of Aging and Disability Services, Maine Department of Health and Human Services*

2:00pm – 3:30pm

**Program Evaluation, Monitoring, and Assessment** *Lighthouse Ballroom A*

Program assessment, evaluation, and monitoring is critical for ensuring consistent, quality program services, that are in compliance with federal and state requirements. How confident are you that your representatives are doing the “right” things and doing them well? What is the best way to evaluate and monitor? Attendees will join breakout groups based on structure (centralized or decentralized) and share best practices for ensuring compliance with program requirements, monitoring, strategies to address areas of improvement and approach conversations about non-compliance, relationship building, and more.

*Speakers: **Beverley Laubert**, National Ombudsman Program Coordinator, ACL; **Angela Van Pelt**, Iowa State Ombudsman; **Bill Whited**, Oklahoma State Ombudsman; and **Claudette Royal**, New York State Ombudsman*

3:30pm – 4:00pm

**Break**

4:00pm – 5:30pm

**Roundtables**

Attendees will be able to attend two roundtable discussions.

**Session 1 – 4:00 – 4:40** – Choose One

A. **Working Effectively with CMS to Impact Change** *Lighthouse Ballroom A*

This roundtable will explore best practices and strategies for collaborating with CMS to influence meaningful change in policy and regulatory processes. Participants will gain valuable insights into understanding their priorities and leveraging these relationships to create a more efficient, person-centered system.  
*Facilitator: **Sam Brooks**, Consumer Voice Public Policy Director*

B. **Residents’ Rights and Risk** *Lighthouse Ballroom B*

There are rules facilities are to follow to ensure that residents receive adequate and appropriate care. However, residents have the right to accept or reject that care. Where is the line between honoring residents’ wishes and neglect? Can supporting a resident’s right ever be the “wrong” thing to do? How can the LTCOP be certain that a resident understands the consequences of their wishes? This session will discuss electronic monitoring devices as an example of balancing risk and residents’ rights. Some facilities use them claiming they prevent falls; some families use them to uncover abuse; some use them to actually create scenarios of abuse. Rarely are resident perspectives taken into consideration, unless it’s the resident requesting the device.

*Facilitator: **Lori Smetanka**, Consumer Voice Executive Director*

**Session 2 – 4:50 – 5:30** – Choose One

C. **Successfully Appealing Nursing Facility Discharges** *Lighthouse Ballroom A*

Residents of nursing facilities have the right to be protected from inappropriate discharges and to appeal discharges. How does your program assist residents in understanding their rights and options for representation? Does your program represent residents in nursing facility discharges? If so, how? Do you work with legal assistance providers? During this session you will hear from states successful in appealing discharges. Presenters will share examples of individual advocacy and

systems advocacy related to the nursing facility appeal process. Training resources for representatives will be highlighted.

*Facilitators: **Terri Cantrell**, Florida State Ombudsman; **Tracie Rayfield**, Transitions Advocate, FL LTCOP; and **Melanie McNeil**, Georgia State Ombudsman*

**D. Working with Trade Associations in Your State on Successful Collaborative Efforts** *Lighthouse Ballroom B*

This roundtable will explore topics and issues where collaboration between the LTCOP and trade associations can be beneficial to residents. We will also discuss best practices for not being too friendly with the associations and with individual owners and administrators. Come prepared to talk about your experience with keeping the proper distance yet working together.

*Facilitator: **Brenda Gallant**, Maine State Ombudsman*

6:30pm – 9:00pm

**Reception & NASOP Auction**

*Lighthouse Ballroom A*

*Generously sponsored by MonAmi and the Maine Long-Term Care Ombudsman Program*



## Wednesday, April 30

8:00am – 5:00pm

Registration

7:30am – 8:30am

**Breakfast** *Lighthouse Ballroom A*

*Generously sponsored by Collabrios (formerly RTZ)*



8:30am – 10:00am

**You Are Not Alone: A Facilitated Discussion of Program Management Issues – Part III** *Lighthouse Ballroom A*

**Non-State Ombudsmen or Designees are asked not to attend this session.**

Be ready to participate in a robust discussion during our third edition of this session. ACL's Office of Long-Term Care Ombudsman Programs will use de-identified examples of technical assistance requests and issues facing the State Ombudsman in a facilitated session. State Ombudsmen will hear a brief description of the issue and add their perspectives in response to discussion prompts. The session is not intended to provide concrete answers to the issues but to prompt thoughtful examination. Discussion prompts will be useful for State Ombudsmen to apply to their own issues as they arise in day-to-day program management.

*Speaker: **Beverley Laubert**, National Ombudsman Program Coordinator, ACL*

10:00am – 10:30am

**Break**

10:30am – 12:00pm

**NORS Consistency and Quality Assurance: Are We on the Same Page?** *Lighthouse Ballroom A*

This session will dig into pain points in NORS documentation, highlight available NORS training and technical assistance to improve consistency, and share best practices in quality assurance. Presenters will review recent technical assistance and FAQs to provide

additional clarification in reporting activities. Presenters will also share best practices in quality assurance (e.g., reviewing data, training representatives, providing consultations to address errors, establishing program requirements regarding documentation). There will be ample time for questions and discussions.

*Speakers: **Beverley Laubert**, National Ombudsman Program Coordinator, ACL; **Amity Overall-Laib**, Director, NORC; and **Alianne Sipes**, Utah State Ombudsman*

12:00pm – 1:45pm

**Luncheon** Lighthouse Ballroom A



*Keynote Speaker: **Kari Benson**, Deputy Assistant Secretary for Aging, Administration on Aging*

2:15pm – 3:45pm

**Nursing Facility Staffing – The Current Landscape and Strategies for Advocacy**  
Lighthouse Ballroom A

Inadequate staffing continues to be one of the biggest challenges to ensuring residents receive quality care and services. Regulatory requirements at the federal level are tenuous, so what are Ombudsman programs to do when faced with inadequate staffing and care complaints? During this session we will provide updates on the current status of federal staffing requirements, including the new federal minimum staffing regulations. Additionally, we will discuss the tools and resources that exist to support Ombudsman programs in advocating for sufficient staff in nursing homes.

*Speakers: **Lori Smetanka**, Consumer Voice Executive Director; and **Sam Brooks**, Consumer Voice Public Policy Director*

3:45pm – 4:00pm

**Break**

4:00pm – 5:30pm

**Preventing and Responding to Grievances Against You and/or Your Program**  
Lighthouse Ballroom A

Too often we hear comments like, “the ombudsman was afraid to rock the boat,” “the ombudsman didn’t do anything,” “who can help when the ombudsman doesn’t want to,” “by the time the ombudsman visited, it was too late” and so on. When following up on grievances, a common response from an Ombudsman representative is that they were following the direction of the resident, or the complainant didn’t understand the role of the Ombudsman program. While that may be the case, what else could have been done to prevent this misunderstanding and negative perception of the program’s effectiveness? This session will discuss effective approaches to reducing communication issues and grievances and share examples of training and support for your representatives. The session will also review federal requirements for, and examples of, the Ombudsman program grievance processes (e.g., investigating a grievance, policies and procedures, what to do if the grievance is retaliatory, how grievances against an Ombudsman are handled).

Speakers: **Claudette Royal**, New York State Ombudsman; and **Donna Fischer**, South Dakota State Ombudsman

## Thursday, May 1

8:15am – 10:00am Registration

7:00am – 8:15am Breakfast on Your Own

8:30am – 12:00pm **Advocating for Residents with Mental Health Needs: Engaging and Changing the System** *Lighthouse Ballroom A*

Unaddressed mental and behavioral health needs of residents impact the individual resident, staff, and often other residents in the facility. What are appropriate approaches and advocacy strategies? What community or state resources can be tapped to provide assistance? How can Ombudsman programs promote what is working well and address what isn't working, both individually and systemically? The first part of this two-part session will focus on commonly encountered mental health disorders in long-term care; the uses, benefits, and risks of various psychotropic medications; and how to gain comfort in supporting residents with mental and behavioral health needs.

Speaker: **Susan Wehry**, Associate Professor, Geriatrics, College of Osteopathic Medicine, University of New England

### **BREAK (10:00am – 10:30am)**

The second part of the session will discuss the advocacy strategies to engage and advocate for system improvements to better support residents with mental and behavioral health needs in long-term care, individually and systemically.

Speakers: **Susan Wehry**, Associate Professor, Geriatrics, College of Osteopathic Medicine, University of New England; **Cheryl Hennen**, Minnesota State Ombudsman; **Laurie Facciarossa Brewer**, New Jersey State Ombudsman; and **Joani Latimer**, Virginia State Ombudsman

12:00pm – 12:15pm **Conference Closing**

12:15pm – 7:00pm **NASOP Peer Collaboration**

Meet in the hotel lobby.

