

REGISTRATION RATES  
DRASTICALLY REDUCED

With so much to offer, you can't afford  
NOT to attend this year's Spring Institute

# NYAHSA Spring 2009 Training Institute and Exhibition

**June 1 - 3, 2009**

The Saratoga Hilton Hotel &  
Conference Center  
Saratoga Springs  
New York

## Changing TIMES. Changing LIVES.



*Embracing our future | fostering excellence in resident care | conducting research | transforming long term care in the 21st century.*

# P

## re-Conference

MONDAY,  
June 1, 2009

### New This Year!

A choice of **four** different pre-conference programs offering you the opportunity to gain additional knowledge and credit regardless of the time you arrive at Saratoga Springs.

10 a.m. – 5 p.m.

#### Pre-conference registration desk open for registration and information

This year, we're pleased to offer you the option of attending one of four distinct pre-conference intensives. There is a separate registration fee for the pre-conference programs.

### Concurrent Sessions:

Pre-Con 1

11 a.m. – 4 p.m.  
(lunch will be provided)

#### Managing During Down Times: Developing a Productive, Motivated Staff (Q.F. 6)

- Recognize and reduce burnout in employees
- Help employees develop hardiness when faced with difficult changes
- Delegate appropriately and free up your time for high-value activities
- Discuss potential leadership time leaks and how to save time
- Conduct a coaching session and give constructive criticism of performance

- Understand what motivates different people to perform

► *Laura Stack, President and Chief Executive Officer, The Productivity Pro, Highlands Ranch, CO*

1 – 5 p.m.

Pre-Con 2

#### In Pursuit of Excellence: The Lean Journey in Health Care (Q.F. 2,5,6,9)

What is lean? It's a system for organizing and managing product development, operations, suppliers and customer relations. Business and other organizations use lean principles, practices and tools to create precise customer value -- goods and services with higher quality and fewer defects -- with less human effort, less space, less capital and less time than the traditional system of production. The Toyota Production System (TPS), which evolved from this need, was one of the first managerial systems using lean principles throughout the enterprise to produce a wide variety of products at lower volumes and many fewer defects than competitors.

Leaders today in a wide range of industries, nonprofit organizations, government agencies, health care and other areas are finding ways to apply the principles of lean as a means of producing goods and delivering services that creates value for the customer with minimum waste and maximum quality. In this session you will learn the principles, process, framework, the roadmap to transformation and the reason for failure of a lean transforma-

tion. Intertwined in this discussion, a provider who has implemented the lean program will share their journey – their experiences, the successes and their failures. This program will be interactive with dialogue among session participants and ample time for questions and answers.

► *Andy Carlino, Partner, Lean Learning Center, Novi, MI*

► *Tricia Brown, Vice President, Corporate Affairs, Northeast Health, Troy, NY*

2 – 5 p.m.

#### →→ New This Year...A pre-conference program specifically for ACF/Assisted Living Members

Pre-Con 3

#### Cost-Effective Operations Analysis and Financial Summary Benchmarking (Q.F. 1,5)

This session will present prudent revenue enhancement strategies and detailed operations cost reduction initiatives to improve a retirement community's cash flow without impairing resident satisfaction or standards of care. Attendees will learn cost-effective approaches to analyze and compare their current operations with relevant industry benchmarks, identifying specific areas to reduce operating expenses. Approaches to identify, evaluate and respond to possible variances from both accepted financial ratios and industry benchmarks will be addressed.

Custom-designed Excel templates will be provided for future use

by attendees in their individual operations. A detailed but practical case study will be presented that illustrates how initially investing 50 cents per resident/per day on an operations analysis can potentially save \$1.50 to \$2 per resident/per day on a permanent basis. The upside potential resulting from an effective operations analysis is usually very significant.

#### Session Objectives:

- Understand the process of conducting a detailed financial operations analysis and making industry benchmarking comparisons
- Provide attendees with available sources of senior living industry benchmarks
- Show how to evaluate specific departments, creating relevant cost/profit centers
- Demonstrate how to develop an appropriate financial structure and budget for each cost/profit center
- Provide practical approaches for conducting a detailed staffing analysis
- Present innovative and market-responsive pricing policies and strategies

The seminar will demonstrate why an operations analysis is a necessary and appropriate preventative health checkup that every CEO/administrator should consider.

► *Jim Moore, President, Moore Diversified Services, Inc., Fort Worth, TX*

Pre-Con **4**

3 – 5 p.m.

**Update on Resident Pain: Understand New F-Tag Survey Implications and**

**How Pain QMs Impact Your Five-Star Rating (Q.F. 2,3, 5)**

This session will describe and discuss the implications of the new F309 investigative protocol for pain management, review the current CMS Quality Measure for pain and how it factors into the nursing home Five-Star Rating. The new MDS 3.0 (implementation date 10/2010) pain assessment items will be reviewed, along with ideas on how your staff can prepare for this major change by implementing an easy-to-use pain assessment tool. The NYAHSA research team will provide information based on a new predictive model that helps staff identify undetected pain, including a list of key risk factors and tools that can be used to better assess pain in residents with dementia.

**Session Objectives:**

- Describe and discuss the implications of the new F309 investigative protocol for pain management
- Review the current CMS Quality Measure for pain and how it factors into the nursing home Five-Star Rating
- Preview the new MDS 3.0 pain assessment items and ideas on how your staff can prepare for this major change by implementing an easy to use pain assessment tool

▶ *Mary Ersek, Ph.D., RN, FAAN, Associate Professor, University of Pennsylvania School of Nursing, Philadelphia, PA*

▶ *Christie Teigland, Ph.D., Director Health Informatics Research; NYAHSA/Equip for Quality, Albany, NY*

▶ *Linda Spokane, Outcomes Research Analyst, NYAHSA/Equip for Quality, Albany, NY*



## Going Green

**You told us...“I don’t need another conference bag,” ...and this year we are listening!**

In an effort to recycle and reduce conference costs, this year we are asking participants to bring their own conference bag. Bring that gently used, clean NYAHSA bag from years past, and you will be entered to win a \$200 voucher for any NYAHSA/FLTC education program in 2009. Bring a few more bags with you to share, and you increase your chances to win. For every new or gently used, clean NYAHSA/FLTC bag you donate, you have the opportunity to throw your business card into the drum. The winner will be announced at the annual business meeting at 9 a.m. Wednesday, June 3. A second \$200 education voucher will be given to the member who brings the oldest (date) conference bag.

**2 – 5 p.m. Exhibit registration/Set-up**

**5:30 – 7 p.m.**

**→ → Institute Registration in the Exhibit Hall...New This Year**

**Wine, cheese and chocolate party...compliments of NYAHSA Services**

This new format will be more informal. Meet up with your favorite colleagues and exhibitors. Institute registration will be held in the exhibit hall on Monday evening. “Wine down” from a busy day and indulge yourself with our wine, cheese and chocolate party, compliments of NYAHSA Services. Interact with old friends and meet new ones while you register for the 2009 NYAHSA Spring Institute. Experts in wine and cheese pairing will be available to answer your questions and entice you to try new culinary combinations. Exhibitors will also be available for you to meet. Since this is a departure from our previous parties, don’t forget to make your dinner plans with colleagues/exhibitors and enjoy the many dining opportunities Saratoga Springs has to offer.

**→ → Evening Plenary Session**

**...New This Year**

A favorite NYAHSA speaker will share his expertise at this easy-listening session that offers you a chance to learn how to survive in these challenging times and get two hours of educational credit. This program is available free of charge for all full conference registrations or you may register for this session for only \$50.

**7 – 9 p.m.**

**Secrets to Surviving Uncertainty (Q.F.6)**

With many of us feeling professional and personal uncertainty due to today’s economic slowdown, we could be dealing with anxiety and fear. While we cannot control the economy and other forces of change, we can position ourselves to survive in these challenging times. This program will provide insights regarding how attitudinal changes will address the sense of control that is essential to thrive in these unsettling times.

▶ *Francis L. Battisti, LCSW, BCD, Chief Executive Officer, Battisti Networks, Binghamton, NY*

## Institute Begins

# P rogram

7 a.m. – 5:30 p.m.

Institute registration

7:30 – 8:15 a.m.

Continental breakfast in exhibit area

8:15 – 8:30 a.m.

Welcome

8:30 – 9:30 a.m.

## Keynote Address

**Leading Through the Tough Times** (Q.F. 1,2,6)

This session will specifically focus on the transformation of the health care leader's role in this very challenging time, with a new set of leadership expectations. Learn new and practical leadership principles and strategies that reflect emerging demands for value and excellence in the most challenging health care environment. More traditional principles and practices of leadership will be contested, and newer notions and applications for sustainable leader-

ship will be emphasized in the continuous journey to excellence. The speaker will move from the general to the specific, talking primarily about contextual changes having an impact on the activities of leadership rather than those activities themselves. Discussion will stay centered on the forces reflecting the kinds of changes leaders can expect in a transformed health care environment.

▶ *Tim Porter-O'Grady, D.M., EdD, FAAN, Senior Partner, Tim Porter-O'Grady Associates, Inc., Atlanta, GA*

9:30 – 10:30 a.m.

Exhibition/Refreshment break

10 a.m. – 4:45 p.m.

→→ **New This Year: Career Connection Center: Executive Coaching provided by Francis Battisti** (Q.F. 6)

Individual 50-minute coaching session that will help you assess your leadership skills, provide feedback on challenges you are facing within your organization and help you define career goals.

To make an appointment, call Kathy Burke at (518) 449-2707, ext. 138. Appointments are available all day Tuesday. Space is very limited. Continuing education credit will NOT be offered for this program.

10:30 a.m. – 12:30 p.m.

## Concurrent Sessions:

# 1

**The Inspector General's Top Ten: Medicaid Risk Areas and Health Program Integrity** (Q.F. 1,2)

▶ *James G. Sheehan, Medicaid Inspector General, Office of the Medicaid Inspector General, Albany, NY*

# 2

**Practical Principles for Thriving In a Challenging Age for Health Care** (Q.F. 1,2,6)

After the 50-minute keynote presentation, a highly interactive session will explore in detail the participants' own translation and leadership experiences drawn from their work settings. The use of principles and applications from the keynote will serve as the frame for translating principles into action and applying them specifically to challenges, issues and concerns participants identify in dialogue with each other. This two-hour session will emphasize useful applications of leadership principles and will specifically address challenges, problems and concerns with strategies and techniques participants can take back and actually apply in their own leadership roles.

▶ *Tim Porter-O'Grady, D.M., EdD, FAAN, Senior Partner, Tim Porter-O'Grady Associates, Inc., Atlanta, GA*

# 3

**"It's Not Just About the Census Anymore... Financial Success Requires New Metrics of Performance"**

(Q.F. 1,3)

Identify risks and opportunities associated with the growth of managed Medicare and commercial managed care for sub-acute complex medical and rehabilitation care, as well as for the new Medicaid-only case mix determination.

Describe strategies for efficiently providing care for sub-acute patients within the managed-care framework; including discussion of admission criteria, case management, medication cost control, outcome measures, discharge planning, marketing, medical provider relations and customer satisfaction.

Explain a model of management based on cost awareness and revenue monitoring instead of just volume (census) monitoring, and show the application of a dashboard data monitoring tool to guide decision making.

Demonstrate the use of dashboard data monitoring to improve your facility's CMS Five Star-Rating for both clinical and staffing indicators.

▶ *Joseph J. Tomaino, Director, Healthcare Consulting, RSM McGladrey, New York, NY*

▶ *Michael Martinucci, Manager, Healthcare Consulting, RSM McGladrey, New York, NY*

# 4

**Day Rehab: A Model of Innovative Care** (Q.F. 2,3,9)

Village Care of New York created a "day rehab" program to provide outpatient care to post-acute and sub-acute patients under the hypothesis that an elongated, intensified and holistic course of care would decrease hospital readmission rates and improve quality of life. Literature has shown that the benefits of using traditional modalities of post-acute rehabilitation -- namely short-term rehabilitation at a nursing home, or through home health care -- can be limited due to issues of access, scope, usage of equipment or intensity/duration. This session will discuss program design and modifications, vital collaborations and liaisons, outcomes and continuation plans.

▶ *Allison Nidetz, PACE Administrator, Village Care of New York, New York, NY*

▶ *Nancy Ferrara, Director of Centers and Clinical Services, Village Care of New York, New York, NY*

# 5

**Roadmap to Uncover Case-Mix Revenue Using Innovative Rehab Programming and Management** (Q.F. 1,2)

This session will focus on the management of your rehabilitation department, with emphasis on developing programs to capitalize on reimbursement opportunities for your long term residents. These three key topics will be discussed:

- Review the role of the rehab in capturing reimbursement across payer source
- Strategies to uncover who is in your house and how to meet their needs
- Linking therapist intervention to a structured reimbursable program

▶ *Dr. Cheryl Ben-David, PT, DPT, Therapeutic Resources, Long Island City, NY*

## 6 Aging Friendly Communities: An Emerging Trend (Q.F. 1,3,8)

National, state and local initiatives are focusing on creating Aging Friendly Communities throughout New York state. This session will highlight the concept of Aging Friendly Communities, the projects currently under way and opportunities for all long term care providers and local communities to become involved in this emerging trend. Topics to be discussed include:

- Why local community and senior services integration is critical
- The key components of an Aging Friendly Community
- The NYSOFA "Empowering Communities" initiative
- "Best Practices" in developing an Aging Friendly Community
- A New York City Finding Report
- How housing and long term care providers are already involved

▶ *Greg Olsen, Deputy Director, The New York State Office for the Aging, Albany, NY*

▶ *Stuart Kaplan, Chief Executive Officer, Selfhelp Community Services Inc., New York, NY*

▶ *Ken Harris, Director, The NYAHS Center for Senior Living and Community Services, Albany, NY*

## 7 Tools You Can Use to Improve Case Management in ACFs and Assisted Living (Q.F. 1,2)

With the increasing complexity of adult care facilities and assisted living residents and the many changes taking place, strong case management practices are essential. This session will help you strengthen your case management services and ensure compliance with Department of Health regulations. The session will also discuss the new Individualized Service Plan (ISP) required in the assisted living residence (ALR). Whether you are an ACF, ALR or assisted living program (ALP), this session will give you tools to bring back to your facility.

▶ *Frank Rose, CSW, ACSW, RFR Consulting Group, Inc., Latham, NY*

## 8 Dining With Friends: Person Centered Dining for People with Dementia (Q.F. 3,5)

"Dining with Friends" is a program that focuses on dining for residents of nursing homes with dementia. Through an interdisciplinary team effort, the "Dining with Friends" program offers the opportunity for conversation, socialization, fun, hydration and nutrition. The philosophy behind the program is deeply rooted in person centered individualized care and the clinical needs of the elder

with dementia. This presentation will share the story behind the development of the program, its challenges, the role of leadership in sustaining it, measures used to train staff in all departments, the evolution of changes made along the journey and methods of measuring the program's success.

▶ *Kelly Smith Papa, RN, MSN, Director of Education, Research and Dementia Care Consulting at the Alzheimer's Resource Center, Plantsville, CT*

**12:30 – 2:30 p.m.**

Lunch with exhibitors

**2:30 – 4:30 p.m.**

## Concurrent Sessions:

### 1 Pastoral Care: A Contributor to Mission and Margin (Q.F. 1,2)

Professional pastoral care may be the most underutilized resource in health care. While chaplains are present in most facilities, they are rarely positioned to provide maximum benefit to the resident, staff or to the facility itself. This session will discuss the kinds of contributions professionally trained board certified chaplains can be expected to make to an institution and how to position them as major contributors to the facility's most critical strategic initiatives. Low- and no-cost strategies to leverage its pastoral care for maximal benefit will be presented.

▶ *Michael Guglielmo, Director of*

*Pastoral Care Management, The HealthCare Chaplaincy, New York, NY*

### 2 Nursing Home Policy

#### Regulatory and Clinical Update (Q.F. 2,5)

▶ *Sandy Biggi, RN, RAC-C, Director of Nursing Facility Policy, NYAHS, Albany, NY*

▶ *Elliott R. Frost, LMSW, Senior Policy Analyst/Consultant, NYAHS, Albany, NY*

▶ *Jennifer Pettis, RN, RAC-C, Senior Policy Analyst/Consultant, NYAHS, Albany, NY*

▶ *Jackie Pappalardi, Director, Division of Residential Services, Office of Long Term Care, NYDOH, Albany, NY*

▶ *Jackie Pappalardi, Director, Division of Residential Services, Office of Long Term Care, NYDOH, Albany, NY*

### 3 Understanding the EMR (Electronic Medical Record) (Q.F. 2,3,5)

This session will define an EMR, identify the value that an EMR can bring to your organization, explore the obstacles typically encountered on the road to EMR adoption and provide information that may assist an organization in evaluating the potential return on investment.

▶ *Ellen Flaherty, Ph.D., APRN, BC, Vice President for Quality Improvement, Village Care of New York, New York, NY*

▶ *David Finkelstein, Director of Information Services, Village Care of New York, New York, NY*

▶ *Traci Jensen, Chief Marketing Officer, 6N Systems, Wilton, NY*



## 4 Financing Options for Affordable Senior Housing (Q.F. 1,2)

This session is a general overview of affordable housing and will discuss the financing of transactions, including tax-exempt bonds, tax credits, assisted living facilities, rules regarding rent limitations, etc.

▶ *Steve Weiss, Esq., Cannon Heyman & Weiss, LLP, Buffalo, NY*



## 5 Ethical Decision Making in These Economically Challenging Times (Q.F. 1,2)

This session examines the importance of ethical decision making in financially challenging times. This session combines presentation, facilitation and open conversation to examine the relationship between organizational mission and ethical decision making. Significant time will be available for participants to engage each other in open dialogue around how these financially challenging times require increased sensitivity to organizational mission and ethics.

▶ *David Belde, Ph.D., VP, Mission & Ethics System Ethicist, Bon Secours Richmond Health System, Mission Services, Richmond, VA*



## 6 Fraud and Abuse in Home Health and Hospice (Q.F. 1,2)

▶ *Deborah Randall, J.D., Partner, Arent Fox LLP, Washington, D.C.*



## Tuesday, continued

# 7

### Exploring Opportunities to Create or Build HCBS (Q.F. 2,3,5)

Thinking about expanding to create new service lines for your organization? Want to be better positioned to meet the needs and demands of the baby boomer generation? Hear from a panel of experts what opportunities are available in home and community-based care. Learn from members across the state about various services and programs that you could start in your own community, including non-medical/unlicensed programs as well as PACE, adult day health care and the nursing home transition and diversion waiver. Members will share their experiences and discuss opportunities and challenges.

▶ *Jane Shukitis, Vice President, Home and Community Based Services, Unity Health System, Rochester, NY*

▶ *Andrew Cruikshank, CEO, Fort Hudson Health System, Fort Edward, NY*

▶ *Allison Nidetz, Administrator of PACE Programs, Village Care of New York, New York, NY*

# 8

### DOH Assisted Living Update (Q.F. 2)

▶ *NYS Department of Health Representative, Delmar, NY*

# 9

### Improve Efficiency and Decrease Costs with Lean Thinking – Lessons from Toyota (Q.F. 2,5,6,9)

Health care providers across the entire continuum of care are confronted by a similar challenge – how to provide quality care and exceptional customer service in the most efficient and cost-effective manner possible. Given the many challenges that health care providers must face, including rising costs, increased demand for services, regulatory issues and shifting demographics, it has never been more important to focus on efficiency and quality of service.

Lean thinking is focused on improving quality (reducing errors), workflow optimization, customer satisfaction and waste elimination – the waste or non-value-added activities associated with business processes, as well as improving processes and customer satisfaction. Lean thinking concepts and techniques can help reduce the hidden costs of inefficient processes. The program is an introduction to lean thinking and addresses the primary topics associated with a typical lean health care program. Attendees will be able to:

- Understand what lean thinking is and its background/history
- Understand how lean thinking is being successfully applied to other areas in health care

- Understand lean techniques such as 5S, error-proofing, work-leveling and work standardization
- Understand how to assess/evaluate a process to begin improving it
- Apply selected lean tools and lean techniques to their organization
- Understand typical forms of waste in health care and how to minimize waste within processes
- Begin planning to implement a lean initiative in their organization (tools provided)
- Understand lean leadership and lean coaching skills

▶ *Chris Calderone, Founder of the Lean Healthcare Group, LLC and Senior Lean Consultant, Lean Healthcare Consulting Group, LLC, Jackson, MI*

### 4:30 – 5:30 p.m.

Exhibit time/Refreshment break

### 5 p.m.

Exhibit drawing

### 6:15 – 7:30 p.m.

PAC Reception at the Saratoga Hilton, Saratoga Springs

### 7:30 – 10 p.m.

Networking Dinner at the Saratoga Hilton, Saratoga Springs



### 7 a.m. – 5 p.m.

Institute Registration

### 7:15 – 8 a.m.

Chair's breakfast for new members/First-time attendees

### 7 – 8 a.m.

## Breakfast briefings

A deluxe continental breakfast will be served in each session.

### Intergenerational Service Learning: Volunteering By and For Your Residents and Clients (Q.F. 2,8,9)

This presentation will highlight:

- Ways for elder care agencies to involve residents in civic engagement activities such as service learning
- New research on volunteer recruitment of the elder adult
- The potentially unique benefits in partnering with local college campuses.

WEDNESDAY,  
June 3, 2009

### 2 ADHCC State and Federal Update (Q.F. 1,2)

▶ *Christine M. Fitzpatrick, Executive Director, Adult Day Health Care Council, Albany, NY*

### 3 NYAHS Nursing Home Reimbursement Update (Q.F. 1,2)

▶ *Patrick Cucinelli, Senior Financial Policy Analyst, NYAHS, Albany, NY*

### 4 Research You Can Use (Q.F. 9)

▶ *Carol Hegeman, Director of Research, Foundation for Long Term Care, Albany, NY*

▶ *Debi Buzanowski, Senior Research Projects Coordinator, Foundation for Long Term Care, Albany, NY*

### 5 ALP Networking Forum (Q.F. 1,2)

▶ *Facilitator: Diane Darbyshire, Senior Policy Analyst, NYAHS, Albany, NY*

Experiences of NYAHS members in the FLTC's project "Linking Three Generations: Intergenerational Service Learning" will be included.

▶ *Amy Davenport, Project Manager/ Researcher, Foundation for Long Term Care, Albany, NY*

▶ *Dr. Paul Rodin, Director of Experienced-based Education and Professor of Psychology, SUNY College at Oswego, Oswego, NY*

The only limit to our realizations of tomorrow will be our doubts of today.

–Franklin D. Roosevelt

2009 NYAHS Spring Institute

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8 – 9 a.m.

**NYAHS A Annual Meeting/  
NYAHS A Services  
Shareholder’s Meeting**

## Plenary Sessions:

9 – 10 a.m.

**As The World Turns: Senior Living Meets Global Aging with Innovations and Technology (Q.F. 2,3,5)**

How senior living providers meet the oncoming age wave won’t exactly be a soap opera, but the changes it will bring about will definitely be dramatic! Join us on an exciting exploration of the forces driving the need for new models of senior housing and care to meet both the demographic and psychographic needs of an aging U.S. and worldwide population.

- Examine examples of unique and state-of-the-art communities for different cultural, niche and special needs populations
- Discover how applications of “Nana” technologies and alternative forms of senior living are being developed for the future
- Unearth the next generation of senior living that will address the issues presented by Global Aging and evolve way beyond one-size-fits-all models

▶ *Andrew Carle, Assistant Professor and Founding Director, Program in Assisted Living/Senior Housing Administration, George Mason University, Fairfax, VA*

10 – 10:30 a.m.

**The Culture of Hope (Q.F. 1,2)**

In the face of tough economic times, the work of associations becomes ever more important. Hear from AAHSA’s CEO and President about our strategies to represent your needs, advance your interests and secure the future for you and those you serve.

▶ *Larry Minnix, President and Chief Executive Officer, AAHSA, Washington, D.C.*

10:45 a.m. – 12:45 p.m.

## Concurrent Sessions:



**EQUIP: The CMS Five-Star Rating System Is a Bumpy Road: How To Understand and Improve Your QM**

**Score Using EQUIP Technology (Q.F. 1,2,9)**

There is a lot riding on the Quality Measures (QM) derived from your facility Minimum Data Set (MDS). The QMs are part of a complex measurement system that CMS uses to gauge the quality of care provided by nursing homes. Aggregated QM ratings are now publicly reported to help consumers select a nursing home, but are they up to the challenge? The QMs directly affect your survey results, determine reimbursement and will be used in pay-for-performance. This session will help administrators understand what the QMs mean -- and don’t mean -- and how decision-support technology can help your staff

make optimal use of the wealth of data routinely collected to ensure high quality care.

**Session Objectives:**

- Recognize the importance of the QM/QIs to your facility and the value of educating more than just nursing staff about QM/QIs
- Evaluate and explain your facility Five-Star Quality Measure rating to staff, residents, families and the public in the context of your resident population
- Develop a facility-wide process for integrating QM/QI data into your QA process using EQUIP technology to minimize future adverse outcomes, maximize reimbursement and make optimal use of scarce nursing resources

▶ *Christie Teigland, Director, Health Informatics & Research, EQUIP for Quality, Albany, NY*

▶ *Kathy Pellatt, Lead Quality Improvement Analyst, EQUIP for Quality, Albany, NY*

▶ *Linda Smith, Quality Improvement Analyst and HRSA Project Director, EQUIP for Quality, Albany, NY*



**How to Establish Relationships with Post-Acute Providers without Violating the Law (Q.F. 1,2)**

Skilled nursing facilities (SNFs), assisted living facilities (ALFs) and independent living facilities (ILFs) are increasingly interested in forming relationships with post-acute providers such as home health agencies, hospices, private duty agencies and home medical equipment (HME) companies. Since



**“Real Food for Real People,” Restaurant Quality Food Service in Assisted Living and Long Term Care (Q.F. 5,8)**

Dining is an anticipated event and constant topic of conversation among your residents. The dietary department is one of the largest cost centers of your facility and is one of the most difficult areas to achieve customer satisfaction.

- How can you improve the quality and presentation of your menu items while keeping costs low?
- How do you know how much food to prepare while responding to the variety and choices that your residents want each day?
- How do you persuade your nursing staff to improve their care giving and service methods without making them feel like waiters and waitresses?

Using retail restaurant methods in your dietary department will allow you to increase menu choices, improve food and service quality and streamline your food and labor

▶ *Elizabeth Hogue, Esq., Summerville, S.C.*

costs. We will discuss how to make the transition from traditional tray line or steam table execution to restaurant style.

New technologies, better labor management and more accurate food accounting systems will improve the efficiency of your staff and have them all running in the same direction. When your staff can focus more on the customer, the residents will get the choices they want, the care they need and the respect and hospitality they deserve. The result is customer satisfaction.

**Session Objectives:**

- How to assess the quality of the food you serve now and the environment of your dining facility
- How to convert to restaurant methods using restaurant style service and instant complaint resolution to improve customer satisfaction
- Realizing the actual cost savings effect of streamlining tasks and improved fiscal management

▶ *Bill Lutz, Vice President, Optimum Solutions and Strategies, LLC, Columbus, OH*



**Create a Customized Tool Kit for Staff Retention (Q.F. 1,6,9)**

Three evidence-based programs have been proven to improve staff retention in New York state nursing homes. This session reviews them and provides tips on which will work best in your facility/agency (including other levels of care) and

## Wednesday, continued

how to customize them to meet your needs.

► *Carol Hegeman, Director of Research, Foundation for Long Term Care, Albany, NY*

► *Other speakers TBD*

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### Hot Topics in Home Care; a Federal Perspective (Q.F. 1,2)

► *Deborah Randall, J.D., Partner, Arent Fox LLP, Washington, D.C.*

6

### Provider-Based Managed Care (Q.F. 2)

Managed care continues to be a hot topic in long term care. This session will focus on recent developments and opportunities for provider organizations in this arena. Learn from your peers about their experiences with Medicare SNP and PACE and hear about the latest developments at the state and federal levels.

► *Facilitator: Darius Kirstein, Senior Policy Analyst, NYAHS, Albany, NY*

► *Shawn Bloom, President and CEO, National Pace Association, Alexandria, VA*

► *Kathryn A. McGuire, Senior Vice President, ArchCare, New York, NY*

► *Linda Gowdy, Director, Bureau of Continuing Care Initiatives, Albany, NY*

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### Nursing Home Compliance in 2009 (Q.F. 2)

Rate audits... bed reserve audits... data mining... as the state Medicaid In-

spector General aggressively looks for overpayments and the federal Medicare program introduces new integrity initiatives, it's time for administrators to renew their focus on corporate compliance. We'll review the latest federal and state initiatives, discuss key changes in the Supplemental Compliance Program Guidance for Nursing Facilities, identify operational risks and help you to reinvigorate your Corporate Compliance program.

► *Lourdes Martinez, Esq., Garfunkle, Wild and Travis, P.C., Great Neck, NY*

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### Identity Theft Prevention Program: Status Update (Q.F. 1,10)

The federal government recently promulgated regulations that require health care providers (e.g., physicians, nursing homes, hospitals, etc.) to develop and implement a written Identity Theft Prevention Program by May 1, 2009, to detect, prevent and mitigate medical identity theft. When the Federal Trade Commission begins enforcing these new rules, failure to comply could mean administrative penalties of up to \$2,500 per violation. Under the government's new regulations, the Identity Theft Prevention Program must include reasonable policies and procedures for detecting, preventing, and mitigating identity theft. Upon development, the program must be formally authorized and adopted by the entity's governing body or senior management, which is required to provide ongoing administrative oversight of the program's implementation, including staff training and designation of an

oversight employee, audit compliance and the generation of annual assessment reports.

► *Patrick Formato, Esq., Abrams, Fensterman, Fensterman, Eisman, Greenberg, Formato & Einiger, LLP, Lake Success, NY*

9

### Retail Therapy: How "Mystery Shops" Teach Valuable Lessons (Q.F. 1,2,5)

You've just been mystery shopped. How did you do? The direct purchase relationship between senior housing providers, residents and families demands a critical need for professional and ethical marketing, from the point of first contact and throughout the sales process. Be the first to hear about nationally recognized telephone "Mystery Shops" conducted by students of the George Mason University Program in Assisted Living/Senior Housing Administration and learn some valuable lessons from the results.

Evaluate how your organization measures up to senior living benchmarks for critical areas of success.

- Study examples of poor and best practice performances that demonstrate what to do and what not to do
- Identify the problems of "iPod" marketing and what you need to be wary of
- Know how to keep your community out of the "Hall of Shame" and continue to be a high quality provider

► *Andrew Carle, Assistant Professor and Founding Director, Program in*

*Assisted Living/Senior Housing Administration, George Mason University, Fairfax, VA*

10

### "Integrating Technology into Your Culture Change Journey" (Q.F. 2,3,8)

The worlds of culture change and technology don't usually meet in the same sentence. This unique presentation, geared toward nontechnical individuals, will demonstrate how technology can seamlessly fit into an organization's culture change journey. Through adaptive computer workstations and a rich source of information content, the computer can become an integral part of a community's programming for meaningful resident involvement and staff communication. The presentation will provide hands-on examples of the adaptive technology and demonstrate multiple video clips and testimonials of residents with severe physical and cognitive disabilities whose lives have been changed. Case studies will be provided of how the technology has impacted staff and families as well as the residents. They will demonstrate how technology has been integrated into their activity programming, therapy programming, marketing, volunteer programming and used as a tool to encourage family visits into the community.

► *Jack York, CEO/Founder, It's Never 2 Late, Centennial, CO*

12:45 – 2 p.m.

Awards luncheon

2 – 4 p.m.

## Concurrent Sessions:

1

### Achieving Successful Outcomes in Long Term Care Electronic Medical Record

**Implementation: Perspectives Learned Through Provider/ Vendor Collaboration (Q.F. 2,3,5)**

This presentation will focus on a leading-edge approach in the planning and execution of electronic medical record (EMR) implementation developed through the experience of successful provider/vendor collaboration. This session will be presented by the provider and vendor in these parts:

- Preparing for implementation
- Navigating the implementation phase
- Using the leading-edge adoption model for long term care developed by the provider and vendor -- with this approach, the long term care provider can achieve significant positive outcomes as a result of an EMR implementation

► *Janine Savage, RN, RAC-CT, Vice President of Clinical Operations/ Corporate Compliance Officer, United Methodist Homes, Binghamton, NY*

► *Doron Gutkind, Chief Software Architect, Lintech, LLC, Rochelle Park, NJ*

# 2

## **Making a Difference in a World That Seems Different (Q.F.5)**

As the old saying goes, the more things change, the more they stay the same. Or do they? The environment in which we operate is in a state of constant flux, challenging all of us to remain abreast of the most important shifts that are occurring and the potential implications they have for what we consider to be effective leadership. Many people feel surrounded by uncertainty, both professional and personally.

In this interactive session, we'll explore how the world around us is most changing and how it is staying the same. We'll answer the questions: What's going on around us? How will success be defined in the future? What will be required for us to lead others (and ourselves) to achieve that definition of success? You'll leave with a better understanding of how to answer for yourself (and how to involve others in answering) one of the principal questions of leadership: What matters most right now?

▶ *Jeff Cufaude, President, Idea Architects, Indianapolis, IN*

# 3

## **Employment Law Concerns In Difficult Times (Q.F.2,6)**

Grim economic news has many organizations contemplating strategies to reduce labor costs. This seminar focuses on what you need to know about the labor and employment law implications of downsizing and cost-cutting.

To that end, we will discuss best practices for the planning and implementing of involuntary layoffs as well as voluntary resignation programs. We will also discuss recent legislation, such as the New York state WARN Act and other new requirements. Additionally, we will talk about the legal implications of various alternatives to layoffs, including hour reduction and other compensation adjustments.

▶ *Laura Harshbarger, Esq., Bond, Schoeneck & King, PLLC, Albany, NY*

# 4

## **What Post-Acute and Residential Providers Need To Know About Patients' Right to Freedom of Choice of Providers (Q.F.1,2)**

Providers and residential facilities are required by law to honor a patient's right to freedom of choice of providers. Ethically, providers are also required to respect this important right. Staff at facilities, however, regularly encounter a number of issues related to this legal and ethical right of patients. These dilemmas include: What should staff do when patients cannot or do not wish to exercise this right? What about physicians who write orders for specific post-acute providers or who pressure patients to accept the provider of their choice? What does the Balanced Budget Act of 1997 require with regard to this right? What do Conditions of Participation (COPs) for hospitals have to say about this issue? What is the latest guidance from the Office of the Inspector General (OIG)? What must Assisted Living Facilities and Inde-



pendent Living Facilities to do in order to comply with the law? This presentation will address all of the issues as well as other dilemmas that providers regularly confront in their efforts to comply with applicable legal and ethical requirements. The emphasis will be on recent developments and practical.

▶ *Elizabeth Hogue, Esq., Summerville, SC*

# 5

## **Risk Management in Assisted Living (Q.F.1,2)**

This session will discuss:

- Fair Housing Act requirements for assisted living
  - Handling disruptive residents
  - Get the facts: pointers for conducting internal investigations
  - OMIG Medicaid audits of ALPs
  - Should assisted living providers have a compliance program?
  - Update on the Empire Association lawsuit challenging ALR regulations
  - What's on your mind? Q&A
- ▶ *Susan V. Kayser, Partner, Duane Morris LLP, New York, NY*

# 6

## **State Legislative and Budget Update (Q.F.1,2)**

▶ *Dan Heim, Vice President for Public Policy, NYAHS, Albany, NY*

▶ *Ami Schnauber, Director of Government Relations, NYAHS, Albany, NY*

# 7

## **DOH Home Care Update (Q.F.2)**

▶ *NYS Department of Health Representative, Delmar, NY*

# 8

## **Compliance vs. P.P.D. In Food Service...Without Aspirin! (Q.F.5,8)**

Reaching common goals is more easily accomplished when you are able to coordinate your dietary and nursing departments. This requires the development of logistics and communication systems to insure that compliance standards are met. Empowering your staff to problem-solve with the resident at the point of service is the best way to immediately increase hospitality and improve customer satisfaction ratings. Want to know how to manage these systems while not increasing your costs and meeting a

# 9

## **Enabling Housing: The Crisis of Availability and Affordability (Q.F.2,3,5)**

Decades ago, the field of environmental psychology demonstrated the importance of a properly designed environment for elders and the differently-abled. This seminar will present the importance of proper human-environment fit and how it can enable our elders to thrive. A discussion of the obstacles preventing the realization of enabling environments, as well as an examination of possible solutions, will be explored.

▶ *Esther S. Greenhouse, M.S., CAPS, Environmental Gerontologists, Cornell University, Ithaca, NY*

# Closing Plenary Session

4 – 5 p.m.

*From Ideas to Action: Being a Learning Ambassador* (Q.F. 2,6)

→→ **New This Year - Add value to your conference dollars and attend the 2009 Spring Institute Closing Session**

We leave conferences filled with great intentions and grand ambitions, but the inertia of daily demands often quickly overtakes them. By thoughtfully distilling key take-aways from the spring conference and developing simple strategies to infuse them in your organization, you can interrupt this all too frequent cycle. This interactive session will give you an opportunity to do just that and will offer practical pointers for how you can be a learning ambassador to (and for) your organization, helping to achieve greater results in the future.

▶ *Jeff Cufaude, President, Idea Architects, Indianapolis, IN*

5 p.m.

*Institute conclusion/drawing*

## *Big Savings for your Facility*

If your facility sends:

Three full delegates to the Spring Institute, the third and subsequent registrants will receive \$75 off the full delegate registration fee (all registrations must be sent simultaneously).



## Saratoga's Convention and Tourism Bureau

Information on restaurants, attractions, lodging and services of Saratoga Springs will be available Monday, June 1 from 4:30 to 7:30 p.m. and Tuesday, June 2 from 8 a.m. to noon in the City Center Gallery.

## Recreational Events/ Opportunities

Take advantage of Saratoga's famous recreational activities:

- Mineral baths and massages
- Quaint sidewalk cafes, dozens of specialty shops and boutiques
- National Museum of Dance, The Racing Museum, Yaddo

Additional information regarding these activities and more can be obtained through the Saratoga Convention and Tourism Bureau, (518) 584-1531, [www.discover-saratoga.org](http://www.discover-saratoga.org).

## *Don't wanna miss a thing???*

Maybe you are saying to yourself: "There are a lot of great sessions at this year's Institute. I can't decide which sessions to attend." Why miss anything? Bring additional staff with you to Saratoga and take advantage of all the substantive programs. NYAHSA will even help you with savings on the conference registration fees.

## NYAHSA MISSION STATEMENT

To create the future of aging and continuing care services in New York State.



# Changing TIMES. Changing LIVES.

*Embracing our future | fostering excellence in resident care | conducting research | transforming long term care in the 21st century.*

# Special Events

**MONDAY,  
June 1, 2009**

## 1. Executive Pre-Conferences

↓ New this year...We are offering four different pre-conference programs

↓ \*There is an additional registration fee for attending the pre-conferences.

## 2. NYAHSA Golf Tournament

Details regarding NYAHSA's Annual PAC Golf Tournament will be available shortly. For information, contact NYAHSA at (518) 449-2707.

## 3. Wine, Cheese and Chocolate Party... compliments of NYAHSA Services

*Saratoga Springs City Center*

**5:30 – 7 p.m.**



**TUESDAY,  
June 2, 2009**

## 1. The Spring Institute Exhibition

is a one-day show on Tuesday, June 2. Your morning coffee, lunch and refreshment breaks will be served in the exhibit hall on Tuesday. The exhibitor drawing will conclude the events of the day at 5 p.m. Take this opportunity to view the products and services available to you as long term care providers. If you would like an exhibitor prospectus to pass on, please contact NYAHSA at (518) 449-2707.

## 2. PAC Kickoff Reception

*Saratoga Hilton, Saratoga Springs*

**6:15 – 7:30 p.m.**

## 3. Dinner/Entertainment

*Saratoga Hilton, Saratoga Springs*

**7:30 – 10 p.m.**

Enjoy an evening of delicious food, open bar and the companionship of good friends.



**WEDNESDAY,  
June 3, 2009**

## 1. Chair's New Member/ First-Time Attendee Breakfast

**7:15 – 8 a.m.**

Become more familiar with NYAHSA while enjoying a continental breakfast. Find out how you can become a vital part of your association.

## 2. NYAHSA Annual Meeting/ NYAHSA Services Shareholder Meeting

**8 – 9 a.m.**

## 3. Awards Luncheon

**12:45 – 2 p.m.**

Join the NYAHSA leadership at this special luncheon honoring your colleagues for their outstanding contributions to long term care. Congratulations to all!

**5 p.m.**

## Institute Conclusion/Drawing

At the final session, completed Institute evaluations will be collected for a prize drawing of a free registration to the 2010 Institute. You must be present to win!

# Featured Speakers

MONDAY, JUNE 1

11 a.m. – 4 p.m.

1. Executive Pre-Conference:

**Managing During Down Times: Developing a Productive, Motivated Staff**

**Laura Stack, President and Chief Executive Officer, The Productivity Pro, Highlands Ranch, CO**

Laura holds an MBA and has been awarded the Certified Speaking Professional (CSP) designation, the highest earned designation given by the National Speakers Association. She is the bestselling author of books "Find More Time: How to Get Things Done at Home," and "Leave the Office Earlier®," which has been translated into five foreign languages in seven countries, as well as numerous Chicken Soup for the Soul books.

Widely regarded as one of the leading experts in the field of employee productivity and workplace issues, she has been featured nationally on the CBS Early Show, CNN, NPR, the New York Times, USA Today and many others. Her client list includes national associations and government agencies, as well as Microsoft, IBM, the Denver Broncos, and her favorite – Dairy Queen.

1 – 5 p.m.

2. Executive Pre-Conference:

**In Pursuit of Excellence: The Lean Journey in Health Care**

**Andy Carlino, Partner, Lean Learning Center, Novi, MI**

**Tricia Brown, Vice President, Corporate Affairs, Northeast Health, Troy, NY**

A nationally recognized speaker, trainer and consultant, Andy is founder and partner of Achievement Dynamics. His specialties include training, education and consulting in the areas of Toyota Production Systems, Lean Manufacturing, Kaizen Implementation, Shop Floor Management, Control Point Standardization, Supply Chain Management and Facilitator Development.

Andy is also founder and partner of the Lean Learning Center in Novi, Mich. Combined, these two organizations transform vision into performance and develop leaders and learners for lean transformation. In Andy's words, "Together, we've created a powerful learning resource for you to make your lean initiative a success."

Andy has more than 20 years of experience in real-world senior management, including president and COO, and is a nationally renowned lean expert. He has worked with thousands of individuals from the boardroom to the shop floor, in virtually all sectors of industry. His clients have included: DaimlerChrysler, BISS-SELL, Siemens, Deere & Co., Detroit Edison, BlueCross BlueShield, Visteon, Johnson & Johnson and Wise Foods. He also provides organizational assessments and due diligence for the private equity investment community

and for food processing companies, heavy and light manufacturing, assembly, medical devices, foundries and more.

Andy has presented programs at Harvard University and Clemson University, is a frequent keynote speaker for a variety of professional organizations and conferences and is a certified instructor for the states of Illinois, Wisconsin, Iowa, and Pennsylvania Industrial Training Programs. He is co-author of *The Hitchhiker's Guide to Lean: Lessons from the Road*, in which he and co-author Jamie Flinchbaugh reveal the most critical lessons learned over their combined 30-plus years of exploring the lean highways.

Tricia Brown is Vice President of Corporate Affairs at Northeast Health (NEH). She supports the Board of Directors from a governance standpoint and manages system integration projects. The majority of her time is spent leading the lean quality initiative across the Patient Care and Long Term Care (Eddy) divisions of the system. She facilitates Kaizen events, learning labs, demonstration projects and value stream mapping projects within NEH's hospitals, home care, housing, nursing home and rehabilitation services. She teaches the tools of lean and is responsible for infusing "lean thinking" into the day-to-day work of NEH's employees, with the overall goal of changing the culture to an empowered work force.

Tricia has worked for Northeast Health for 15 years. Prior to NEH, she held positions at General Electric and General Motors. She earned a bachelor of science in industrial engineering from Rensselaer Polytechnic Institute in 1986.

2 – 5 p.m.

3. Executive Pre-Conference:

**Cost-Effective Operations Analysis and Financial Summary Benchmarking**

**Jim Moore, President, Moore Diversified Services, Inc., Fort Worth, TX**

Jim Moore has more than 40 years of industry experience. For the past 37 years, the company he founded, Moore Diversified Services, Inc., has served literally thousands of national and international clients. Jim's company is heavily involved in market feasibility studies, detailed financial pro forma analysis, strategic planning, operations analysis and investment advisory services.

Moore spends most of his time in the trenches – the real world of senior housing. Jim has personally conducted more than 2,000 major senior housing and health care consulting engagements in over 750 markets in 49 states - experience that is unmatched in the industry today. He has also conducted more than 40 major international consulting engagements in Japan, Australia, China, Canada, Europe, Central America and Mexico.

He has moderated more than 800 senior consumer and business focus groups. As part of his consulting practice, he has actually lived briefly in more than 100 retirement and assisted living communities. His clients include a broad spectrum of national leaders and small organizations with a balanced mix of both for-profit and not-for-profit clients.

Moore is the industry's leading independent living and assisted living author. He has authored several

hundred industry technical papers, trade journal articles and a weekly business column for two major newspapers. He is the author of several books on senior housing. His previous book, "Assisted Living 2000 - Practical Strategies for the Next Millennium" was an industry bestseller. His book, "Assisted Living Strategies for Changing Markets," was released in 2001 and is in its second printing. His newest book, "Independent Living, Congregate Care and CCRCs" will be released this year.

For more than 14 years, he has authored the monthly column "Senior Housing" for Contemporary Long Term Care Magazine. Jim also writes on a regular basis for three other leading senior housing and health care publications, including "Assisted Living Executive," "National Investment Center's Key Financial Indicators" and "McKnights Assisted Living." He also writes a nationally syndicated senior housing and health care column provided directly to senior living communities and state association newsletters and periodicals. He also publishes a monthly e-mail newsletter distributed to industry executives.

3 – 5 p.m.

4. Executive Pre-Conference:

**Update on Resident Pain: Understanding New F-Tag Survey Implications And How Pain QMs Impact Your Five-Star Rating**

**Mary Ersek, Ph.D., RN, FAAN, Associate Professor, University of Pennsylvania School of Nursing, Philadelphia, PA**

Mary Ersek has conducted several clinical studies focused on nursing care of nursing home residents with pain and those at the end of life. She is a frequent speaker on these topics and is widely published in the palliative care and pain management fields. She also was the lead developer and is a regular faculty member for the End-of-life Nursing Education Consortium (ELNEC) – Geriatric curriculum, which is a nationally recognized program focused on caring for frail elders in nursing homes.

## TUESDAY, JUNE 2

### Keynote Address



### **Leadership Through Tough Times: Tactics for a Challenged Health Care System**

**8:30 – 9:30 a.m.**

**Tim Porter-O'Grady, D.M., EdD, FAAN, Senior Partner, Tim Porter-O'Grady Associates, Inc., Atlanta, GA**

Dr. Tim Porter-O'Grady has been involved in health care for 38 years and has held roles from staff nurse to senior executive in a variety of health care settings. Tim is currently senior partner of an international health care consulting firm in Atlanta specializing in health futures, organizational innovation, conflict and change, as well as health service

delivery models. He is noted for his work on shared governance models, clinical leadership, conflict, innovation and health futures. He is associate professor and leadership scholar at Arizona State University, Program in Healthcare Innovation; 2007 Visiting Scholar at University of Maryland, and is an adjunct professor at Lakehead University, School of Public Health, Ontario, Canada.

Tim holds two doctorates in clinical leadership: one in learning behavior and a second in organizational and systems leadership. In addition, he received a doctor of science degree, *honoris causa*, from the Medical University of Ohio. He has done post-doctoral work in aging and is board certified in advanced practice in gerontology. Tim is also certified by the Georgia Supreme Court's Office of Dispute Resolution as a registered mediator and arbitrator.

Tim has published extensively in health care with more than 165 proctored journal articles and 17 books and is a six-time winner of the AJN Healthcare Book of the Year Award. He has consulted internationally with more than 500 institutions and has lectured in more than 1,000 settings internationally. He has held a number of offices in professional as-

sociations and national and community boards, including the vice chair of the governing board of Catholic Health East, governor with Sigma Theta Tau International, president of AID Atlanta, and the Georgia Nurse's Foundation.

## WEDNESDAY, JUNE 3

### Plenary Session



### **As the World Turns: Senior Living Meets Global Aging with Innovations and Technology**

**9 – 10 a.m.**

**Andrew Carle, MHA, Assistant Professor and Founding Director, Program in Assisted Living/Senior Housing Administration, George Mason University, Fairfax, VA**

Andrew Carle is an Assistant Professor and founding Director of the Program in Assisted Living/Senior Housing Administration within the College of Health and Human Services at George Mason University, Fairfax, Va. The program offers the first academic curricula in the nation dedicated exclusively to the rapidly growing senior housing field. Andrew brings more than 20 years of executive level senior housing and health care experience to the program, including the development of both

operating systems and innovative ancillary service programs for a national Top 10 senior housing provider.

In addition to the George Mason program, Andrew has received national and international recognition for identifying and defining a new category of senior housing – University Based Retirement Communities (UBRCs)™, as well as a definition and categories for “Nana” Technology™ (technologies for older adults). His work has been featured by the New York Times, Washington Post, UPI, USA TODAY, Smart Money, Business 2.0, The Chronicle for Higher Education, National Public Radio, FOX Morning News and Retirement Living TV among others; internationally in Agence France Presse, KYODO News Service, the Australian Broadcast Corporation, and Israeli National Television; and in numerous senior housing industry publications.

Andrew has published numerous articles and presented nationally and internationally on a variety of senior housing operations, marketing and related topics, including providing the keynote address at the 25th Australian Congress on Aging in 2006. His book, “Moments, Memories, and Mission: Stories from the Field of Assisted Living,” received a Silver Award during the 15th Annual National Mature Market Media competition. He is the recipient of a 2006 “Best of the Best in Aging Services” Award from Aging News Alert, the 2004 “Leaders in Aging – Mentor Award” from the National Committee to Preserve Social Security and Medicare and was awarded “Teacher of the Year” honors for the Undergraduate Program in Health Science in 2002. Andrew has a bachelor's degree in business

administration/marketing from the State University of New York at Buffalo and a master's in health services administration from George Washington University. He continues to serve as a consultant to the senior housing industry, universities, and technology companies including Nintendo, Vigorous Mind and GTX Corporation.

## WEDNESDAY, JUNE 3

### Closing Session

### **From Ideas to Action: Being a**



### **Learning Ambassador**

**4 – 5 p.m.**

**Jeff Cufaude, President, Idea Architects, Indianapolis, IN**

Jeff is a former association executive and university student affairs staff member. He is an architect of ideas, building communities of ideas and idealists through his writing, facilitation, and speaking. His areas of work include strategic thinking and planning sessions; volunteer and staff development workshops and retreats; leadership conference design and facilitation and major keynotes.

# G

## General

# Information

## Registration Information

The registration fee for Full Institute Delegates includes conference materials, attendance at all sessions, two deluxe continental breakfasts, two luncheons, Institute Wine, Cheese and Chocolate Party and our Tuesday evening dinner event. Registration in advance is strongly advised. To take advantage of the early bird registration offer, the conference registration form must be faxed or postmarked on or before May 4. Additionally, payment or voucher must be received by June 3; otherwise you will be charged the late registration fee. Cancellations received by May 18 are refundable, less a 25 percent administrative fee. Cancellations must be received in writing (by fax: (518) 434-4385, attn: Kathy Burke, or e-mail kburke@nyahsa.org). After that, cancellations are subject to forfeiting the entire registration fee. Those who are registered and do not attend the conference and fail to comply with the cancellation policy, will be billed. Substitutions are permitted.



**Registration rates have been drastically reduced.** Our community of aging professionals is especially feeling the pinch of this difficult economy. In response, NYAHSA has reduced the registration fee for the for the 2009 Spring Training Institute and Exhibition.

## Registration Fees

	NYAHSA Members/Trustees		Non-members	
	Before May 4	After May 4	Before May 4	After May 4
<b>Pre-Con June 1</b> -----				
Pre-con 1	\$145	\$170	\$195	\$220
Pre-con 2	\$130	\$155	\$180	\$205
Pre-con 3	\$75	\$100	\$125	\$150
Pre-con 4	\$50	\$ 75	\$100	\$125
<b>Full</b>	<b>\$475</b>	<b>\$575</b>	<b>\$575</b>	<b>\$675</b>
<b>Tuesday, June 2</b>	<b>\$250*•</b>	<b>\$300*•</b>	<b>\$300*•</b>	<b>\$350*•</b>
<b>Wednesday, June 3</b>	<b>\$250*</b>	<b>\$300*</b>	<b>\$300*</b>	<b>\$350*</b>

\*Tuesday and Wednesday daily fee includes lunch.

•Fee does not include admission to dinner/entertainment on Tuesday evening.

## Hotel Accommodations

### →→ Gated Hotel Parking – New this year!

NYAHSA Conference attendees still have FREE Parking!

Here's how!

When you approach the hotel parking lot, go to the gate, push a white button and receive a ticket. Bring the ticket to the front desk in exchange for a room card; no charge will be applied for parking, and the room key will allow access in and out during the stay. Commuters can bring the ticket to the front desk to have it validated.

The Saratoga Hilton Hotel and Conference Center has undergone a spectacular transformation offering modern, boutique-style décor. Newly renovated guest rooms feature premium cable television and wireless Internet access in addition to other amenities such as modem/data port, cordless phone and speakerphone, in-room video games and movies, complimentary daily newspaper; iron and ironing board and self-controlled heating/cooling.

Additionally, the well-known Saratoga restaurant Chez Sophie has relocated to The Saratoga Hilton. Known for its contemporary dining with a French twist

and award-winning wine inventory, the Chez Sophie dining experience can certainly enhance any visit to Saratoga.

A two-night minimum stay (Monday and Tuesday) is required on all reservations at the Saratoga Hilton Hotel and Conference Center. A Sunday night stay does not apply toward the minimum requirement.

The registration fee does not include the cost of hotel accommodations. The Saratoga Hilton has provided reduced room rates. Please fill out the enclosed hotel reservation form and send it directly to the hotel. If reservations must be made by phone, please specify that you are attending the New York Association of Homes & Services for the Aging's Spring Training Institute and Exhibition.

\$155 Single ▶ \$165 Double

Check-in time: 3 p.m.

Check-out time: 11 a.m.

Because the Institute's programs begin early, room assignments may not be available when you check in. Arrangements have been made to store your luggage.

If applicable, please present your New York state tax-exempt certificate at the time of reservation or check-in. Please note: If you use your facility's tax-exempt form, payment for your hotel expenses must be made with a check from your facility or with your facility's credit card. Payment for hotel expenses cannot be made with a personal check/credit card when you use your facility's tax-exempt form.

**Hotel reservations MUST be made by April 30**

518-584-4000 (phone)

518-584-7430 (fax)

## Casual Dress is “In” for the 2009 Institute

Please be aware that the temperature of meeting rooms is difficult to regulate; for your comfort, we recommend dressing in layers and keeping a sweater or jacket handy.

## Traveling To Albany

NYAHSA has designated Plaza Travel as the official travel agent for this year's Institute. Call Plaza Travel at (800) 666-3404 and you will receive the lowest fare available at the time of booking.

## Ground Transportation

Limousine service to and from the Albany Airport is NOT available through the Saratoga Hilton. Taxi/limousine service costs approximately \$65 one way. NYAHSA will provide a shuttle service for our members from the airport to The Saratoga Hilton Monday through Wednesday at a cost of \$40 per person, round-trip. Please call Earl Gifford at (518) 449-2707, ext. 149, or e-mail [egifford@nyahsa.org](mailto:egifford@nyahsa.org) for further information regarding this service.

## Institute Continuing Education Credit

The Institute is sponsored by the Foundation for Long Term Care (FLTC). The FLTC is a certified sponsor of professional continuing education with the National Association of Boards of Examiners for Long Term Care Administrators (NAB). This program has been submitted for 19 hours of continuing education credit for nursing home administrators under its sponsor agreement with NAB/NCERS. State licensure boards, however, have final authority on the acceptance of individual courses. These 19 CEUs include the pre-conference session.

A certificate of completion will be sent to adult care facility and assisted living administrators upon verification of the hours attended. A maximum of 19 hours will be awarded. These 19 CEUs include the pre-conference session.

A certificate of completion will be sent to all AAHSA CASP graduates upon verification of the hours attended. A maximum of 19 hours will be awarded.

### **Certified Aging Services Professionals (CASP) - formerly Retirement Housing Professionals (RHP)**

All education sessions are applicable for CASP Certification. Graduates certified by the Coalition for Leadership in Aging Services (CLAS) may use continuing education credits from this conference towards their CASP/CASPF certification renewal.

The Institute has been approved for 12 hours of continuing education credit for certified public accountants.

*Note: We will no longer be submitting a NCERS CE program attendance report to the Florida State Board for Long Term Care Administrators.*

*Embracing our future | fostering excellence in resident care | conducting research | transforming long term care in the 21st century.*



A leader has the power to draw strength from adversity, and create opportunity while others despair.

# Hotel Registration

## NYAHS A 2009 Spring Train- ing Institute & Exhibition

The Saratoga Hilton Hotel and  
Conference Center

Thank you for requesting reserva-  
tions at The Saratoga Hilton Hotel  
and Conference Center. Our entire  
staff would like to extend a warm  
welcome to you during your up-  
coming meeting.

### The Saratoga Hilton Hotel and Conference Center

534 Broadway

Saratoga Springs, NY 12866

518-584-4000 (phone)

518-584-7430 (fax)

Reservations must be received  
no later than April 30, 2009 in  
order to receive a discounted  
group rate. Otherwise, full-pub-  
lished rates will apply. All reserva-  
tions must be guaranteed using a  
credit card or deposit. Guests may  
be penalized for early departure.  
All reservations must be guaran-  
teed for the entire stay. Unless the  
reservation is changed prior to  
arrival, the guest will be charged  
the full rate for their entire stay.  
Deposit is refundable if reservation  
is cancelled 48 hours in advance of  
arrival and a cancellation number is  
obtained.

**Phone: 518-584-4000**

If making a reservation by phone,  
please confirm you are attending  
the NYAHS A conference to qualify  
for the special conference rate.

Sunday, May 31 – Wednesday, June 3, 2009

Check-in: 3 p.m.  
Check-out: 11 a.m.

*Print or Type*

Name \_\_\_\_\_

Company \_\_\_\_\_

Address \_\_\_\_\_

City/State/Zip \_\_\_\_\_

Phone No. (\_\_\_\_) \_\_\_\_\_

Sharing room with: \_\_\_\_\_

(If sharing room with more than one person, list all names.)

Smoking room       Non-smoking room

### To Guarantee Reservation Only:

Credit card number \_\_\_\_\_ Expiration date \_\_\_\_\_

Type of card \_\_\_\_\_

Authorized signature \_\_\_\_\_

Credit card will be used for:  Guarantee only       Payment of charges

A two-night minimum stay (Monday and Tuesday) is required on all reservations at The Saratoga Hilton Hotel. A Sunday night stay does not apply toward the minimum requirement.

Please check preferred accommodations:

- \$155 single occupancy, excluding tax
- \$165 double occupancy, excluding tax
- King: 1 or 2 persons/one bed
- Double: 1 or 2 persons/two beds
- Double/Double: 1- 4 persons/two beds
- Rollaways: available upon request

The hotel will attempt to accommodate your request. However, at times this may not be possible and we will provide the best available room.

Arrival date: \_\_\_\_\_ Departure date: \_\_\_\_\_

Please complete and return this hotel registration form to:

### The Saratoga Hilton Hotel and Conference Center

534 Broadway

Saratoga Springs, NY 12866

Attn: Reservations

or fax: 518-584-7430

# Conference Registration

## NYAHSA 2009 SPRING TRAINING INSTITUTE & EXHIBITION

(Please type or print) Please photocopy for additional registrants.

Name \_\_\_\_\_

Title \_\_\_\_\_

Affiliation \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

E-mail address \_\_\_\_\_

Phone (\_\_\_\_) \_\_\_\_\_ Fax (\_\_\_\_) \_\_\_\_\_

- I am a new member of NYAHSA or a first-time Institute attendee.  
I plan to be at the conference Wine, Cheese & Chocolate Party on Monday night.  
 Yes  No

### Wednesday Awards Luncheon

(If you are a full conference attendee or a Wednesday daily attendee, you MUST make a meal choice)

- Chicken Tuscany  
 Thai Salmon  
 Vegetable stir fry  
Special meal request:  Kosher  Vegetarian  Gluten free  
(If not specified, a regular meal will be served.)  
Do you require any special aids/services to attend this conference?  Yes  No

## Registration Fees

NYAHSA Members/Trustees	Non-members			
	Before May 4	After May 4	Before May 4	After May 4
<b>Pre-Con June 1</b> -----				
Pre-con 1	\$145	\$170	\$195	\$220
Pre-con 2	\$130	\$155	\$180	\$205
Pre-con 3	\$75	\$100	\$125	\$150
Pre-con 4	\$50	\$75	\$100	\$125
<b>Full</b>	\$475	\$575	\$575	\$675
<b>Tuesday, June 2</b>	\$250*•	\$300*•	\$300*•	\$350*•
<b>Wednesday, June 3</b>	\$250*	\$300*	\$300*	\$350*

\*Tuesday and Wednesday daily fee includes lunch.  
•Fee does not include admission to dinner/entertainment on Tuesday evening.

## Big Savings for Your Facility

If your facility sends:

- Three Full Institute Delegates to the Spring Institute, the third and subsequent registrants will receive \$75 off the full delegate registration fee (all registrations must be sent simultaneously).

## Important!

If you are confused about whether you need to order meal tickets, please call your NYAHSA/FLTC conference contact with your questions/concerns. Meal tickets are non-refundable; therefore, incorrect purchases will cost you money. Contact Kathy Gormley at 518-449-2707, ext. 114.

## Additional Tickets

Tuesday and Wednesday daily conference registration fee includes lunch tickets, but not dinner tickets.

Tuesday lunch with exhibitors:  
\$30 x \_\_\_\_\_ = Total \$ \_\_\_\_\_

Tuesday networking dinner  
\$60 x \_\_\_\_\_ = Total \$ \_\_\_\_\_

Wednesday Awards Luncheon  
\$40 x \_\_\_\_\_ = Total \$ \_\_\_\_\_

## Payment Method

- Check (payable to FLTC)  
 MasterCard  VISA  AMEX  Discover

Card No. \_\_\_\_\_ Exp. date: \_\_\_\_\_

Cardholder's name (exactly as on card) \_\_\_\_\_

Authorized signature \_\_\_\_\_

Customer Code: \_\_\_\_\_ (This is the 3-digit number on the back of your credit card near the signature strip.)

**Please make check payable to FLTC**  
Complete form and return with payment to:

FLTC, 150 State Street, Suite 301

Albany, New York 12207-1698

Phone: 518-449-2707 Fax: 518-434-4385

*As you may know, NYAHSA from time to time photographs our members and other conference participants during the conference and videotapes conference events, and will often feature participants' pictures [and video recordings] from our conferences in NYAHSA publications or on our Web site. By registering for and attending the conference, you acknowledge and agree that your name and photo [or video image] taken at the conference may be used in this manner.*

# Workshop Selections

## Monday, June 1

Please check your choices:

### Concurrent Executive Pre-Conference Sessions:

- Pre-Con 1: Managing During Down Times (\$145) 11 a.m. – 4 p.m. OR
- Pre-Con 2: Lean Program (\$130) 1 – 5 p.m. OR
- Pre-Con 3: Actual Cost-Effective Operations (\$75) 2 – 5 p.m. OR
- Pre-Con 4: Update on Resident Pain (\$50) 3 – 5 p.m.

\_\_\_I plan on attending the Institute Wine, Cheese and Chocolate party

\_\_\_I do not plan on attending the Institute Wine, Cheese and Chocolate party

### 7 – 9 p.m.

- Secrets to Surviving Uncertainty

## Tuesday, June 2

### 8:30 – 9:30 a.m.

- Keynote Address: Leading Through the Tough Times

### 10 a.m. – 4:45 p.m.

- Executive Coaching Sessions (45-50 minute sessions running all day. You must call for an appointment.)

### 10:30 a.m. – 12:30 p.m.

- The Inspector General's Top Ten
- Practical Principals for Thriving
- Financial Success Requires New Metrics of Performance
- Day Rehab
- Roadmap to Uncover Case-Mix Revenue
- Aging Friendly Communities
- Tools You Can Use to Improve Case Management
- Dining With Friends

### 2:30 – 4:30 p.m.

- Pastoral Care
- Nursing Home Policy/Regulatory and Clinical Update
- Understanding the EMR
- Financing Options for Affordable Senior Housing
- Ethical Decision-Making in These Economically Challenging Times
- Fraud and Abuse in Home Health and Hospice
- Exploring Opportunities to Create or Build HCBS
- DOH Assisted Living Update
- Improve Efficiency and Decrease Cost with Lean Thinking

## Wednesday, June 3

### 7 – 8 a.m.

#### Breakfast Briefings

- Intergenerational Service Learning
- ADHCC State and Federal Update
- NYAHS Nursing Home Reimbursement Update
- Research You Can Use
- ALP Networking Forum

### 7:15 – 8 a.m.

- Chair's breakfast for new members/First-time attendees

### 8 – 9 a.m.

- NYAHS Annual Meeting/NYAHS Services Shareholders Meeting

### 9 – 10 a.m.

- Plenary Session: Senior Living Meets Global Aging

### 10 – 10:30 a.m.

- Plenary Session: The Culture of Hope

### 10:45 a.m. – 12:45 p.m.

- EQUIP: The CMS Five-Star Rating System
- Relationships with Post-Acute Providers
- Real Food for Real People
- Create a Customized Tool Kit for Staff Retention
- Hot Topics in Home Care
- Provider-Based Managed Care
- Nursing Home Compliance in 2009
- Identity Theft Prevention
- Retail Therapy: How "Mystery Shops" Teach Valuable Lessons
- Integrating Technology Into Your Culture Change Journey

### 2 – 4 p.m.

- Achieving Successful Outcomes in EMR Implementation
- Making a Difference in a World That Seems Different
- Employment Law Concerns in Difficult Times
- Right to Freedom of Choice of Providers
- Risk Management in Assisted Living
- State Legislative and Budget Update
- DOH Home Care Update
- Compliance vs. P.P.D. in Food Service
- Enabling Housing: The Crisis of Availability and Affordability

### 4 – 5 p.m.

- Closing Session: From Ideas to Action



**If you recruit a company that has not previously participated in the Spring Institute as a sponsor, you will receive the following discount:**

1 new sponsor	\$ 50 savings
2 new sponsors	\$ 100 savings
3 or more new sponsors	FREE REGISTRATION!

Call NYAHS for an exhibitor prospectus or specialty sponsor packet.

# Supplemental Hotels | NYAHSA 2009 Spring Training Institute & Exhibition

Supplemental rooms have been reserved at the hotels below. Reservations for these hotels must be made by telephone. To receive discounted rates, please specify that you are attending the New York Association of Homes & Services for the Aging's Spring Training Institute and Exhibition.

DO NOT USE THE HOTEL RESERVATION FORM IN THIS BROCHURE FOR RESERVATIONS AT THE SUPPLEMENTAL HOTELS.

## 1. The Gideon Putnam Hotel

24 Gideon Putnam Road  
Saratoga Springs, NY  
518-584-3000

1-800-732-1560

\$139 single/double

Check-in time: 4 p.m.

Check-out time: noon

Ten rooms are available for Sunday, May 31, Monday, June 1, and Tuesday, June 2.

Individuals must guarantee rooms within (10) days of making reservations. Any reservation canceled within 72 hours of arrival will be charged a one-night stay.

**Cut-off date: May 2, 2009**

[www.gideonputnam.com](http://www.gideonputnam.com)

## 2. Holiday Inn Saratoga

Broadway at Circular Street  
Saratoga Springs, NY 12866  
518-584-4550

\$ 129.95 single Check-in time: 2 p.m.

\$ 129.95 double Check-out time: 11 a.m.

Five sleeping rooms are available for Sunday, May 31 and fifteen rooms for Monday, June 1 and Tuesday, June 2.

Sleeping rooms held until 6:00pm unless guaranteed by a major credit card or one-night deposit. For guaranteed no-shows, you will be charged for one night's stay and subsequent night's reservation will be canceled. Individual reservations may be canceled 72 hours prior to arrival. After this time, deposits will not be refunded.

**Cut-off date: April 30, 2009**

[www.hisaratoga.com](http://www.hisaratoga.com)

## 3. The Inn At Saratoga

231 Broadway  
Saratoga Springs, NY 12866  
518-583-1890

\$129 single (includes full buffet breakfast)

Check-in time: 3 p.m.

Check-out time: 11 a.m.

Five rooms are available for Sunday, May 31. Ten rooms are available for Monday & Tuesday, June 1 & 2.

The Inn at Saratoga requests that all reservations be guaranteed with either a one-night rate deposit or credit card. Hotel will charge a fee equivalent to one night's room and tax for any no-show reservations. Cancellations will be accepted up to 72 hours in advance of arrival. If cancellation is not received at least 72 hours in advance, a charge equal to the last night's room and tax will be assessed.

**Cut-off date: April 20, 2009**

[www.theinnsaratoga.com](http://www.theinnsaratoga.com)

## 4. The Hilton Garden Inn

125 South Broadway  
Saratoga Springs, NY 12855  
518-587-1500

\$132 single Check-in time: 4 p.m.

\$132 double Check-out time: 11 a.m.

Twenty rooms are available for Sunday, May 31, and 20 rooms are available for Monday, June 1 and Tuesday, June 2.

Cancellations must be received 24 hours prior to arrival date.

**Cut-off date: May 1, 2009**

[www.hilton.com](http://www.hilton.com)

## 5. The Six Sisters Bed & Breakfast

149 Union Avenue  
Saratoga Springs, NY  
518-583-1173

\$120 - \$130 plus tax single/double rate

Check-in time: 2 p.m.

Check-out time: 11 a.m.

Rate includes full breakfast

First-come, first-served for reservations  
[www.sixsistersbandb.com](http://www.sixsistersbandb.com)

## 6. The Westchester House

102 Lincoln Avenue  
Saratoga Springs, NY  
518-587-7613

\$125 - \$140 single

Check-in time: 2 p.m.

Check-out time: 11 a.m.

First-come, first-served for reservations  
[www.westchesterhousebandb.com](http://www.westchesterhousebandb.com)

## 7. The Marriott Courtyard

11 Excelsior Avenue  
Saratoga Springs, NY  
518-226-0538

1-800-321-2211

\$139 single/double

Check-in time: 3 p.m.

Check-out time: 11 a.m.

Fifteen rooms are available for Sunday, May 31 and 40 rooms for Monday, June 1 and Tuesday, June 2.

Cancellations must be received 24 hours prior to arrival date.

First-come, first-served for reservations

**Cut-off date: April 30, 2009**

## 8. The Hampton Inn

25 Lake Avenue  
Saratoga Springs, NY  
518-584-2100

\$149. single/double

Check-in time: 3 p.m.

Check-out time: 11 a.m.

Fifteen rooms are available for Sunday, May 31, Monday, June 1 and Tuesday, June 2.

Cancellations must be received 72 hours prior to arrival date.

First-come, first-served for reservations

**Cut-off date: April 30, 2009**

## 9. The Saratoga Arms

497 Broadway  
Saratoga Springs, NY  
518-584-1775

\$145 single w/o breakfast

\$160 double w/o breakfast

Check-in time: 4 p.m.

Check-out time: 11 a.m.

This is a concierge hotel under the personal supervision of the proprietor. Across the street from the City Center; this historic building has been recently renovated and decorated as an upscale property. Each room is unique. However, all rooms include antiques, voice mail, data-port, TV, CD player and private baths. ALL ROOMS ARE NON-SMOKING.

Reservations taken up to date of conference based on availability

[www.saratoga-lodging.com](http://www.saratoga-lodging.com)

## 10. The Marriott Residence Inn

295 Excelsior Avenue  
Saratoga Springs, NY  
518-584-9600

\$159 for studio or one-bedroom suite

Includes free home-style breakfast each morning and complementary evening social Monday – Thursday Shuttle service available to conference hotel

Check-in time: 3 p.m.

Check-out time: noon

Ten suites are available for Sunday, May 31 - Thursday, June 4.

Cancellations must be received 24 hours prior to arrival date.

First-come, first-served for reservations

**Cut-off date: April 19, 2009**

# NYAHSAs Commitment to Quality First

NYAHSAs supports the concepts, philosophy and principles set forth in the American Association of Homes and Services for the Aging's five-year plan, Quality First: A Covenant to Achieve Healthy, Affordable and Ethical Aging Services. In the development of the 2009 Spring Training Institute and Exhibition, the education committee based the selection of several educational programs on the 10 elements of Quality First, providing members with information to enhance their excellence and effectiveness in aging services. The number by each session description cross-references to the elements of Quality First.

## QUALITY FIRST ELEMENTS KEY

- 1=Covenant
- 2=Governance Accountability
- 3=Leading-Edge Care and Services
- 4=Community Involvement
- 5=Continuous Quality Improvement
- 6=Human Resources Development
- 7=Consumer-Friendly Information
- 8=Consumer Participation
- 9=Research and Education
- 10=Public Trust and Consumer Confidence

New York Association of Homes & Services for the Aging  
150 State Street, Suite 301, Albany, New York 12207-1698  
[www.nyahsa.org](http://www.nyahsa.org)

First Class Mail

 **Registration rates drastically reduced**

Sponsored by the Foundation for Long Term Care (FLTC), education affiliate of the New York Association of Homes & Services for the Aging (NYAHSAs)



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