



2023

CALA  
FALL CONFERENCE  
& TRADE SHOW

NOVEMBER  
6-8

# elevate

Renaissance Palm Springs Hotel  
& Palm Springs Convention Center



# special events

## monday



9:00 - 10:00 AM

### Growing Your Workforce Pipeline - Exploring Strategies, Resources & Best Practices

**LIMITED SEATING!**  
first come, first served!

**Facilitators:** Doug Lessard, COO & Executive Vice President, Belmont Village Senior Living

Andrew Sheppard, Vice President of Operations, Brookdale Senior Living

Jan Trifiro, Vice President of Workforce & Professional Development, CALA

As providers face continued workforce recruitment and retention challenges in this ever-evolving work world, they've also experienced some successes and positive outcomes along the way. Join your peers representing CALA's Workforce Development Committee and engage in frank, solutions-focused roundtable discussions. Come prepared to share challenges, insights and best practices. Hear about numerous tools and resources developed by and for CALA members to help tackle commonly faced challenges and heighten awareness regarding the profession. In keeping with the saying, "A rising tide lifts all boats," you'll leave uplifted and equipped with new ideas and insights.

**If you attended this session at the Spring Conference, please note DSS will not approve CEUs for repeat attendance.**



4:30 - 6:15 PM  
Exhibit Hall Wine Tasting

Sponsored by

**PAYCHEX**  
HR | Payroll | Benefits | Insurance

Start off the CALA Fall Conference & Trade Show with an evening of good wine, appetizers and the opportunity to meet exhibitors and CALA associate members. You'll learn about new products and services available to Assisted Living providers.



3:15 - 4:30 PM

## GENERAL SESSION

### Flying Through Fear – How Vulnerability Fuels Success

Opening General Session featuring Michelle "Mace" Curran, Founder & CEO, Upside Down Dreams

Sponsored by **Vimient**<sup>™</sup>

In today's world, leaders are under constant pressure to hire the right people, create a cohesive team and perform at a high level. However, true success hinges on each team member's ability to be bold and expand their comfort zone, and leaders are tasked to model and continuously reinforce this with their teams, even if challenged by the self-doubt and imposter syndrome many face. Mace Curran battled these obstacles while attempting to find her identity in a high-performance, type-A culture. Hear how she went from struggling with a crippling fear of failure to flying inverted only inches from other aircraft at 500 mph and discover what we're all capable of when we let go of fear, lean into vulnerability and make bold choices. Are you ready to take flight and overcome your fears?

Michelle "Mace" Curran led an impressive career as a Fighter Pilot during her 13 years in the United States Air Force. From 2019-2021, she flew as the only female pilot for the Air Force Thunderbirds and performed for millions across the country and internationally. Upon joining this high performing team, she rapidly discovered the best part was not the flying, but the opportunity to inspire others. Michelle was only the second woman to fly as the Lead Solo in the Thunderbird demonstration since the team's creation in 1953. She realized this put her in a unique position to empower others.

# special events

## tuesday



2:00 - 3:15 PM

### GENERAL SESSION

#### The Latest from CCLD Leadership

##### CCLD Program and Policy Leadership

**Moderator:** Heather Harrison, Senior Vice President of Public Policy and Public Affairs, CALA

Join CCLD leadership as they discuss actions being taken to improve CCLD processes that directly impact licensee operations, such as background checks, administrator certification and application processing. They will also discuss the transparency website and management of licensing visits. Many of the questions come directly from attendees who will pose their questions live, so be sure to submit a question or two well in advance by emailing [heather@CAassistedliving.org](mailto:heather@CAassistedliving.org).

5:15 – 6:30 PM

### Cocktail with cala

Sponsored by



Before you dive into a night out, start your evening with a poolside cocktail and some great company! Join us for a reception at the **East Pool Deck of the Renaissance Palm Springs** for drinks, appetizers, and a beautiful desert sunset over the mountains. Your first cocktail is on us!



## wednesday

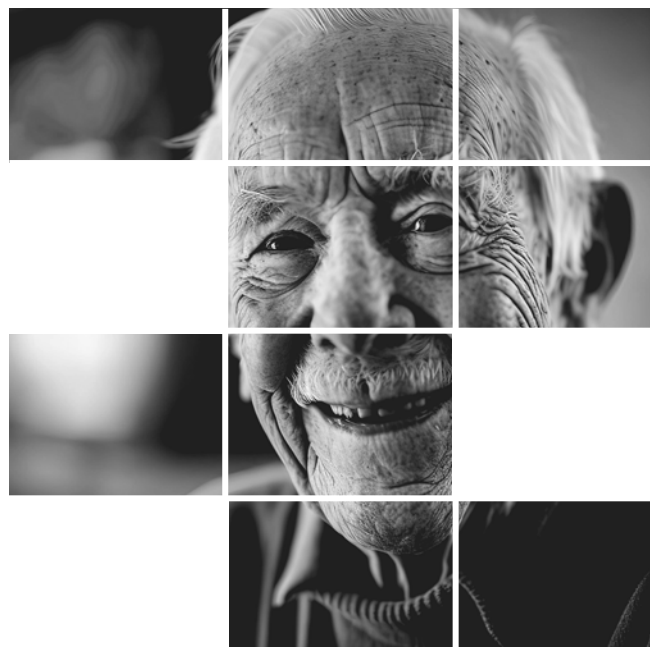
12:15 - 1:30 PM

### AWARDS CELEBRATION LUNCHEON

Sponsored by



Join us as we honor the Excellence in Service Award recipients – those who go above and beyond to provide outstanding care and service and elevate the experience of residents, employees and the community.



# schedule of events

## monday

**8:00 AM – 5:00 PM**      **REGISTRATION HOURS**

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**9:00 – 10:00 AM**      **GROWING YOUR WORKFORCE PIPELINE – EXPLORING STRATEGIES, RESOURCES & BEST PRACTICES** *Limited seating – first come, first served!*

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**10:30 AM – 2:45 PM**      **INTENSIVE SESSIONS**

- 30 Ways in 30 Days to Revive and Retain an Overworked, Overwhelmed Workforce
  - Recruit, Retain, Recharge
  - Identifying Resident Substance Use Through the Lens of Marketing and Care Teams
- 

**2:45 – 3:15 PM**      **DESSERT BREAK**

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**3:15 – 4:30 PM**      **GENERAL SESSION**

- Flying Through Fear – How Vulnerability Fuels Success  
*Opening General Session featuring Michelle “Mace” Curran, Founder & CEO, Upside Down Dreams*  
*Sponsored by [Vimient](#)*
- 

**4:30 – 6:15 PM**      **EXHIBIT HALL WINE TASTING**  
*Sponsored by [Paychex](#)*

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## tuesday

**7:30 AM – 5:00 PM**      **REGISTRATION HOURS**

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**7:15 – 8:15 AM**      **BREAKFAST**

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**8:30 – 10:45 AM**      **CONCURRENT SESSIONS**

- Public Policy Update
  - Artful Empathy – Enhancing Care Through Validation and Creative Expression
  - The Impact of Technology on the Resident Experience
  - Unleash Your Sales Potential – Harnessing Consumer Psychology to Drive Success
  - Using Montessori Principles to Increase Employee Engagement
- 

**10:00 – 10:30 AM**      **COFFEE BREAK**

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**10:30 AM – 12:00 PM**      **CONCURRENT SESSIONS**

- Nourishing Minds – Unlocking the Secrets to a Healthy Brain and Healthy Life!
  - From Crisis to Triumph – Mastering Adversity with Best Practices and a Dash of Resilience
  - Why Sleep Matters to Memory & Brain Health – Simple Strategies to Help Everyone Get Their Zzzzs
  - Unleash Your Authentic Voice & Communicate with Confidence
  - Enhancing the Customer Experience – From First Touch to Move-In
-

# schedule of events

**12:00 – 1:45 PM**                      **EXHIBIT HALL WITH LUNCH**

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**2:00 – 3:15 PM**                      **GENERAL SESSION**

- The Latest from CCLD Leadership
- 

**3:15 – 3:45 PM**                      **DESSERT BREAK**

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**3:45 – 5:15 PM**                      **CONCURRENT SESSIONS**

- Identifying the Root Cause of Behavioral & Psychological Symptoms of Dementia
  - Leading Causes of Liability & How to Avoid Them
  - Innovation & New Technology Showcase - *Limited seating – first come, first served!*
  - Selling With Flair – How to Create a Sales-focused Community Using Dating-Inspired Tips and Data
  - Recipe for Success – Maximizing Foodservice Efficiencies & Outcomes
- 

**5:15 – 6:30 PM**                      **COCKTAILS WITH CALA**

*Sponsored by [Consonus Healthcare](#) and [KPD Insurance, Inc.](#)*

## wednesday

**8:00 AM – 3:30 PM**                      **REGISTRATION HOURS**

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**7:30 – 8:30 AM**                      **BREAKFAST**

---

**8:30 – 10:00 AM**                      **CONCURRENT SESSIONS**

- Navigate Workforce Injury Claims Like a Pro
  - It Takes More Than a Taco Truck
  - The Power of Purpose – Inspiring Meaningful Resident Engagement
  - Tech-Talk – Keys to Successful Technology Partnerships & Adoption
  - Supporting Transgender Residents & Team Members Through Allyship
- 

**10:00 – 10:30 AM**                      **COFFEE BREAK**

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**10:30 AM – 12:00 PM**                      **CONCURRENT SESSIONS**

- Ask the Attorneys
  - Empathy in Motion – Understanding Senior Body Mechanics to Cultivate Compassion
- 

**12:15 – 1:30 PM**                      **AWARDS CELEBRATION LUNCHEON**

*Sponsored by [Yardi Systems, Inc.](#)*

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**1:45 – 3:15 PM**                      **CONCURRENT SESSIONS**

- Preventing & De-Escalating Violence in the Workplace
- Leadership Agility Strategies to Navigate Change



# additional info



## LOCATION

### Conference Location

Renaissance Palm Springs Hotel  
and Palm Springs Convention Center

### Overnight Rooms

Renaissance Palm Springs Hotel

888 E Tahquitz Canyon Way, Palm Springs, CA 92262

**Rate:** \$222

**Cut-off date:** October 3, 2023 (unless sold out earlier)

Tel: 800-228-9290

### [ONLINE RESERVATIONS](#)

If you have any questions, please contact Nancy Ball  
at [nancy@CAassistedliving.org](mailto:nancy@CAassistedliving.org).

HOTEL RESERVATIONS



## APP | CEUs

### Need CEUs? Bring your mobile device!

CALA is a provider with RCFE, NHAP and BRN. To earn CEUs for a session, attendees are required to stay for the entire time AND to check in on the CALA Events app when the session code is provided.

### CEU codes

The following codes, located next to each session description, indicate the types of CEUs for which CALA has applied:

- R** RCFE Administrator
- RD** RCFE Dementia Units
- RLR** RCFE Laws & Regulations
- N** Nursing Home Administrator
- BRN** Nurses and LVNs

# SAVE THE DATE

CALA 2024 SPRING CONFERENCE & TRADE SHOW

**June 3-5, 2024**

Hyatt Regency Sacramento &  
Safe Credit Union Convention Center

# event sponsors

*thank you* to our event sponsors!

as of August 4, 2023

## OPENING GENERAL SESSION

Vimient™

## LANYARDS

RSN TECHNOLOGII

## AWARDS CELEBRATION LUNCHEON

YARDI

## COCKTAILS WITH CALA



CONSONUS  
PHARMACY & REHAB SERVICES

## EXHIBIT HALL WINE TASTING

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## CONFERENCE APP

## ROOM KEYS

CARE WEST  
INSURANCE COMPANY

HEFFERNAN  
INSURANCE BROKERS  
*Because You're Different*

## NAME BADGES

Douglas Pancake  
ARCHITECTS

# ELEVATING TOPIC TRACKS FOR YOU AND YOUR KEY LEADERS

**Note:** While sessions cover multiple topic areas, the CEU codes next to each session title in the full session descriptions identify the types of credits applied for by CALA.

SESSIONS	Dementia Care	Resident Care	Clinical	Wellness & Engagement	Workforce & Leadership	Operations	Sales & Marketing	Legal & Regulatory
<b>Monday</b>								
● Growing Your Workforce Pipeline					✓			
● 30 Ways in 30 Days to Revive and Retain an Overworked...					✓			
● Recruit, Retain, Recharge					✓			
● Identifying Resident Substance Use Through the Lens of Marketing and Care Teams		✓	✓					
● Flying Through Fear – How Vulnerability Fuels Success					✓			
<b>Tuesday</b>								
● Public Policy Update		✓			✓	✓		✓
● Artful Empathy – Enhancing Care Through Validation...	✓			✓				
● The Impact of Technology on the Resident Experience				✓		✓		
● Unleash Your Sales Potential-Harnessing Consumer Psychology							✓	
● Using Montessori Principles to Increase Employee Engagement					✓			
● Nourishing Minds – Unlocking the Secrets to a Healthy Brain	✓							
● From Crisis to Triumph – Mastering Adversity with Best Practices and a Dash of Resilience						✓		✓
● Why Sleep Matters to Memory & Brain Health...				✓				
● Unleash Your Authentic Voice & Communicate with Confidence					✓			
● Enhancing the Customer Experience...							✓	
● The Latest from CCLD Leadership						✓		✓
● Identifying the Root Cause of Behavioral & Psychological Symptoms of Dementia	✓		✓					
● Leading Causes of Liability & How to Avoid Them								✓
● Innovation & New Technology Showcase	✓	✓		✓				
● Selling With Flair – How to Create a Sales-focused Community Using Dating-Inspired Tips and Data							✓	
● Recipe for Success – Maximizing Foodservice Efficiencies					✓	✓		
<b>Wednesday</b>								
● Navigate Workforce Injury Claims like a Pro								✓
● It Takes More Than a Taco Truck					✓			
● The Power of Purpose		✓		✓				
● Tech-Talk – Keys to Successful Technology Partnerships		✓				✓		
● Supporting Transgender Residents & Team Members...		✓		✓	✓			
● Ask the Attorneys								✓
● Empathy in Motion – Understanding Senior Body Mechanics		✓		✓				
● Preventing & De-Escalating Violence in the Workplace					✓	✓		
● Leadership Agility Strategies to Navigate Change					✓			



# monday

november 6



# 8:00 AM – 5:00 PM

Registration

# 9:00 – 10:00 AM

Concurrent Session

## Growing Your Workforce Pipeline - Exploring Strategies, Resources & Best Practices

R N

**Facilitators:** **Doug Lessard**, COO & Executive Vice President, Belmont Village Senior Living

**Andrew Sheppard**, Vice President of Operations, Brookdale Senior Living

**Jan Trifiro**, Vice President of Workforce & Professional Development, CALA

As providers face continued workforce recruitment and retention challenges in this ever-evolving work world, they've also experienced some successes and positive outcomes along the way. Join your peers representing CALA's Workforce Development Committee and engage in frank, solutions-focused roundtable discussions. Come prepared to share challenges, insights and best practices. Hear about numerous tools and resources developed by and for CALA members to help tackle commonly faced challenges and heighten awareness regarding the profession. In keeping with the saying, "A rising tide lifts all boats," you'll leave uplifted and equipped with new ideas and insights.

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# 10:30 AM – 2:45 PM

Intensive Sessions

*A working lunch is included with each session.*

## 30 Ways in 30 Days to Revive an Overworked, Overwhelmed Workforce

R N BRN

**Christopher Ridenhour**, President/Shenanigan Enthusiast, Inspired2Results!

Are you ready to game-plan the bold next steps to creating authentic workplace cultures defined by elevated stability and psychological safety? Explore what it takes for everyone in the building to take personal accountability for creating "WOW!" moments for both external and internal customers? Discover the secret sauce for "unprecedented" workforce commitment and loyalty? Come with a flexible mindset and be prepared to explore retention strategies that offer best practices in crisis management, team engagement and emotional intelligence – all leading to measurable results.

## Recruit, Retain, Recharge

R N BRN

**Chris Havens**, Recruiter, Watermark Retirement Communities

**Debbie Penn**, National Director of Recruiting, Watermark Retirement Communities

**Molly Ryan-Coe**, Vice President & Executive Recruiter, Govig & Associates

**Jeff Slichta**, COO, Experience Senior Living

If you're looking to strengthen or rewrite your recruitment and retention playbook to better fit the times and your company culture, and leave the "post and pray" methodology in the dust, look no further! Join this panel of experts as they guide attendees through an insightful assessment process and share tools, templates, campaigns and best practices. You'll leave energized and equipped with innovative ideas and the skills needed to build a dynamic and successful recruiting and onboarding playbook and process.

**If you attended this session at the Spring Conference, please note DSS will not approve CEUs for repeat attendance.**

## Identifying Resident Substance Use Through the Lens of Marketing and Care Teams

R N BRN

**Jen Johnson**, National Care Director, Atria Senior Living

**Cheryl Martin**, Executive Director, Prairie City Landing

**Debbie Reilly**, Senior Vice President of Sales, West, Belmont Village Senior Living

**Yong Song, PhD**, Clinical Psychologist, VA San Diego Healthcare System

**Moderator: James Arp**, Senior Executive Director, Belmont Village La Jolla

Substance use occurs in every age group, culture and demographic, and senior living residents are no exception. The challenge lies in balancing self-determination and agency with ensuring residents' safety and maintaining a positive community culture. Learn to identify key cognitive, medical, psychological and psychosocial factors to recognize substance use among residents. From there, explore critical considerations around screening prospective residents, identifying red flags, assessing and providing appropriate support, and leave better equipped to screen, intervene and reduce negative outcomes.

# 2:45 – 3:15 PM

Dessert Break

# 3:15 – 4:30 PM

General Session

## Flying Through Fear – How Vulnerability Fuels Success

*Opening General Session featuring Michelle "Mace" Curran, Founder & CEO, Upside Down Dreams*

R N

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In today's world, leaders are under constant pressure to hire the right people, create a cohesive team and perform at a high level. However, true success hinges on each team member's ability to be bold and expand their comfort zone, and leaders are tasked to model and continuously reinforce this with their teams, even if challenged by the self-doubt and imposter syndrome many face. Mace Curran battled these obstacles while attempting to find her identity in a high-performance, type-A culture. Hear how she went from struggling with a crippling fear of failure to flying inverted only inches from other aircraft at 500 mph and discover what we're all capable of when we let go of fear, lean into vulnerability and make bold choices. Are you ready to take flight and overcome *your* fears?

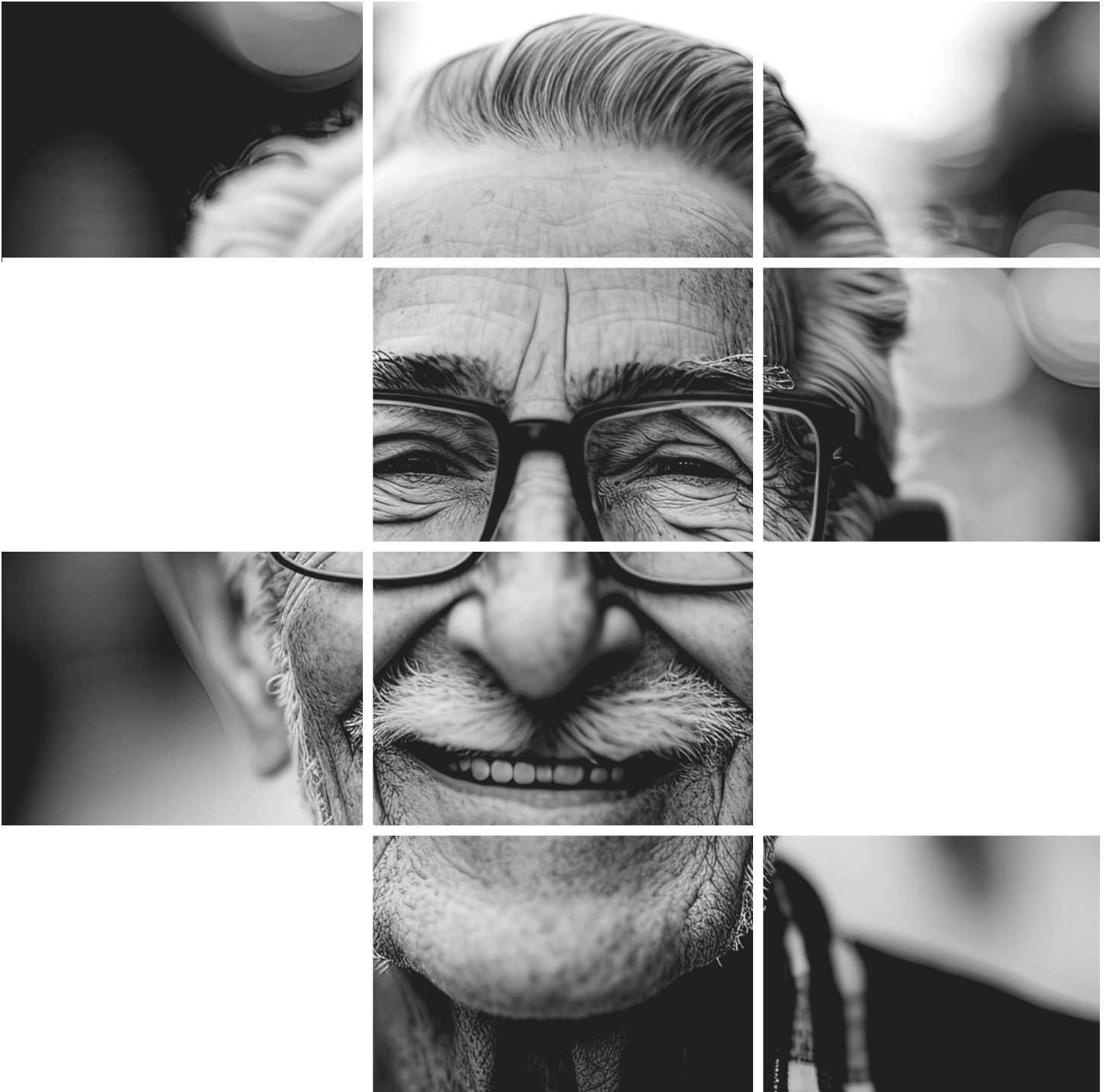
# 4:30 - 6:15 PM

Exhibit Hall Wine Tasting

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**tuesday**  
november 7

# 7:30 AM – 5:00 PM

Registration

# 7:15 – 8:15 AM

Breakfast

# 8:30 – 10:00 AM

Concurrent Sessions

## Unleash Your Sales Potential – Harnessing Consumer Psychology to Drive Success

R N

**Peggy Scoggins**, Owner & Consultant, Adept Senior Living Solutions

If you could accelerate and improve your closing ratios by adapting your sales process to the way consumers buy, would you? If the answer is yes, join this sales and marketing expert for a practical and science-based look at how consumers make their purchasing decisions and the way the brain impacts that process. Gone are the days of “build it and they will come.” Today, it’s critical to uncover customer’s emotional buying motivations to close the deal. Discover helpful strategies to better align your sales process to consumers’ buying process and gain a competitive edge in the marketplace.

## Using Montessori Principles to Increase Employee Engagement

R N

**Gary Johnson**, Owner, Monarch-Pathways

**Odie Tollefson**, Vice President of Human Resources, Pilgrim Place

Have you ever considered applying Montessori principles to improve community culture and increase employee engagement? Join a workplace culture consultant and a provider as they discuss the unique application of these principles and share the outcomes of their case study, undertaken in challenging circumstances and leading to an improved and sustained culture of engagement. Leave with actionable strategies for integrating these proven principles while also utilizing the Gallup Q12 to measure efficacy.

## Public Policy Update

RLR BRN

**Selena Coppi Hornback**, Director of Public Policy, CALA

**Heather Harrison**, Senior Vice President of Public Policy & Public Affairs, CALA

Which new laws and regulations will impact senior living providers? What impact will they have on operations and on the resident experience? Hear the latest on criminal background checks, family councils, abuse reporting and minimum wage, among other issues impacting residents, employees and licensees. Leave with a greater understanding of these critical issues as well as how to impact the legislative process.

## Artful Empathy – Enhancing Care Through Validation and Creative Expression

RD N

**Angel Duncan**, Ph.D., Medical Life Sciences – U.S. Medical & Clinical Affairs, Life Molecular Imaging

**Krissy Wuerdeman**, Owner & Managing Director, That Place You Know, LLC

For residents living with memory loss, art can be a way to communicate thoughts and feelings that have been suppressed and can replace words that might not be expressed otherwise. Artwork is also an effective tool in facilitating the healing process by allowing emotions to be conveyed, creating opportunities for empathic dialogue and care. Explore research efforts in neurosciences and creativity in brain health that is shifting empathic care and learn helpful validation techniques to better understand the meaning behind residents’ artistic creations.

## The Impact of Technology on the Resident Experience

R N

**Lance Bell**, CEO, ServingIntel

**David Tamo**, Regional Director of Operations, Merrill Gardens, LLC

**Alfred Rothschild**, Resident, Merrill Gardens at Rancho Cucamonga

Join a hospitality technology expert, a provider and a resident as they discuss ways in which technology has impacted the resident experience and the potential it holds to further enhance dining, engagement, care and more. With robotics in dining as the launchpad for the discussion, the use of technologies to improve other operational efficiencies, reduce the potential for human error and enable more direct engagement, as well as drive revenue will also be addressed. You’ll gain insights and strategies regarding rollout and implementation of technology solutions and metrics for measuring success in terms of resident satisfaction and financial performance.

# 10:00 – 10:30 AM

Coffee Break



# 10:30 AM – 12:00 PM

Concurrent Sessions

## Nourishing Minds – Unlocking the Secrets to a Healthy Brain and Healthy Life!

RD N BRN

**Susan Howland**, Program Director, Alzheimer's Association, California Southland Chapter

Alzheimer's disease is a global health problem with more than 6 million people living with the disease in the U.S. alone. Thankfully, tremendous gains have been made in understanding the science and role lifestyle and other risk factors associated with cognitive decline play in later life. Explore recent research and advances that are leading to great strides in prevention, detection and therapeutic interventions across the lifespan and leave with a greater understanding of modifiable and non-modifiable risk factors that hold the potential to impact outcomes.

## From Crisis to Triumph – Mastering Adversity with Best Practices and a Dash of Resilience

R N BRN

**Jillian Somers Donovan**, Partner, Hanson Bridgett, LLP  
**Hanh Ta**, Healthcare Compliance Consultant, The Good Life, LLC

Post-incident response and documentation are not only important to operational integrity and quality but can also impact future litigation and regulatory action. Take an up-close look at regulatory requirements around responding to adverse incidents as you explore investigation techniques. Examine best practices and potential pitfalls for following-up after an incident while considering the benefits and risks of responses to various adverse incident scenarios.

## Why Sleep Matters to Memory & Brain Health – Simple Strategies to Help Everyone Get Their Zzzzs

R N BRN

**Cynthia Green, PhD**, President, Total Brain Health/TBH Brands

While most of us know that sleep is critical to overall health and wellbeing, few really understand how it works, why getting enough rest matters, or what we can do to improve the experience. Join a brain health expert and gain a greater understanding of the mechanics as well as the numerous ways that sleep can impact thinking, memory, healthy aging and overall wellbeing. Walk away with several proven, easy-to-implement strategies to help ensure you and those you serve enjoy restful, restorative sleep.

## Unleash Your Authentic Voice & Communicate with Confidence

R N BRN

**Darlene Hawley**, Leadership & Business Coach, Trainer, Darlene Hawley

Becoming a more effective communicator starts with trusting your own voice. Join a leadership coach and discover a vocal empowerment system designed to help you communicate with confidence and ease, while empowering others to do likewise. Learn how to tell powerful stories that move people to take action, communicate your company's value to prospects, allow listeners to connect at a deeper level and navigate difficult conversations with greater self-trust. The results? A workplace where team members feel safe and supported to communicate more authentically and effectively so everybody can thrive.

## Enhancing the Customer Experience – From First Touch to Move-In

R N

**Jen Lovely**, Executive Vice President of Sales, Conversion Logix  
**Sophia Lukas**, COO, St. Paul's Senior Services  
**Amanda Warren**, Vice President of Marketing, Merrill Gardens

While a prospective resident's journey to find their next home can be complicated and non-linear, helpful insights can be gained along the way that enable sales teams to customize their approach and better meet prospects where they are. From researching online to scheduling a virtual tour and chatting with a live agent, each of these "touches" captured through marketing campaigns, websites and lead capture software tell a story that can be leveraged to improve outcomes. Discover how attribution insights enable you to nimbly tailor a prospect's experience to meet them where they are at in the journey and provide onsite teams with information to build better connections.

# 12:00 – 1:45 PM

Exhibit Hall with Lunch

Take time before and after lunch to meet and network with exhibitors to learn about new products and services they have to offer. Please make sure to visit and thank each exhibitor as they contribute greatly to the success of the association.

# 2:00 – 3:15 PM

General Session



## The Latest from CCLD Leadership

RLR BRN

**CCLD Program and Policy Leadership**

**Moderator:** Heather Harrison, Senior Vice President of Public Policy & Public Affairs, CALA

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## 3:15 – 3:45 PM

Dessert Break

## 3:45 – 5:15 PM

Concurrent Sessions

### Identifying the Root Cause of Behavioral & Psychological Symptoms of Dementia

RD N BRN

**Kim Butrum, RN, GNP**, Senior Vice President, Clinical Services, Silverado | Memory Care Communities

It's estimated that 97% of all people living with dementia experience behavioral and psychological symptoms of dementia (BPSD) at some point in their disease process. However, before these expressions are assumed and attributed to one's disease process and medicated away with psychotropic medications, a full assessment should be conducted in order to consider what the behavioral expression may be communicating. As pain and discomfort can also cause behavioral manifestations, they should routinely be considered. Discover tools that can be helpful in the assessment process in order to better address the true cause of BPSD occurrences.

### Leading Causes of Liability & How to Avoid Them

R N BRN

**Tara Clayton**, Senior Vice President, Marsh  
**Joel Goldman**, Partner, Hanson Bridgett, LLP  
**John Tsumura**, Partner, Wilson Getty, LLP

Providing for an optimal resident experience while minimizing risk and reducing avoidable costs requires diligence and can feel like a continuous balancing act. A proactive approach that takes into account leading causes of regulatory citations and professional liability claims can be helpful to achieving and maintaining that balance. Join these seasoned attorneys as they explore current trends and underlying causal factors that heighten exposure to potential regulatory deficiencies and liability claims. You'll gain practical insights and strategies to help reduce your risk.

### Innovation & New Technology Showcase

R N

**Ashish Aggarwal**, CEO, Caavo  
**Matt Smith**, CEO and Co-Founder, Speak2 Family  
**Larry Wolff**, Chief Technology Officer, TapRoot Interventions & Solutions

Join the innovators of an AI-powered digital assistant helping to improve care for residents living with cognitive change through behavioral approaches (TapRoot), an easy-to-use voice command interface for staff, residents and family members (Speak2) and a TV-connected platform that brings video calls, wellness checks and assistance requests to any TV, empowering staff and families to remotely control it from anywhere (Caavo). Each will provide a guided tour of key features, identify the challenges these technologies tackle and address your

**LIMITED SEATING!**  
*first come, first served!*

questions. Leave with a greater sense of the potential these and other technologies hold in supporting resident well-being and engagement, making delivery of care and services more efficient and effective.

### Selling With Flair – How to Create a Sales-focused Community Using Dating-Inspired Tips and Data

R N

**Teddy Helfrich**, Vice President of Sales, WelcomeHome Software

Believe it or not, sales and dating are more alike than you may think! Whether you are the executive director, the sales director, a member of the care team or otherwise, you are inviting people into your family. Consider these similarities – getting married is the goal; volume isn't always better; touring is the third date; communication is key; being set up by reliable sources tends to work better; and persistence pays off! Explore tactical insights and helpful data as you learn to apply a similar approach with prospective residents. You'll leave better equipped to align community departments in a manner that creates and maintains a sales-focused culture.

### Recipe for Success – Maximizing Foodservice Efficiencies & Outcomes

R N

**George Collado**, CEO, MyFieldAudits  
**Greg Gorgone**, Co-Founder, Pineapple Academy, Inc.  
**Matt Perez**, National Director of Dining Services, MBK Senior Living

As operators face continued staffing challenges, supply chain issues, and ever-increasing costs to run the foodservice department, the impact the dining experience has on resident and staff satisfaction can't be understated. The key to success lies in maximizing efficiencies without compromising taste or the overall dining experience. Join these "seasoned" experts and explore the use of technology to manage the dining department with fewer FTEs and standardized productivity tools, while helping staff deliver consistent, enjoyable meals, improving the experience and satisfaction for residents and staff alike.

## 5:15 – 6:30 PM

# Cocktails with cala

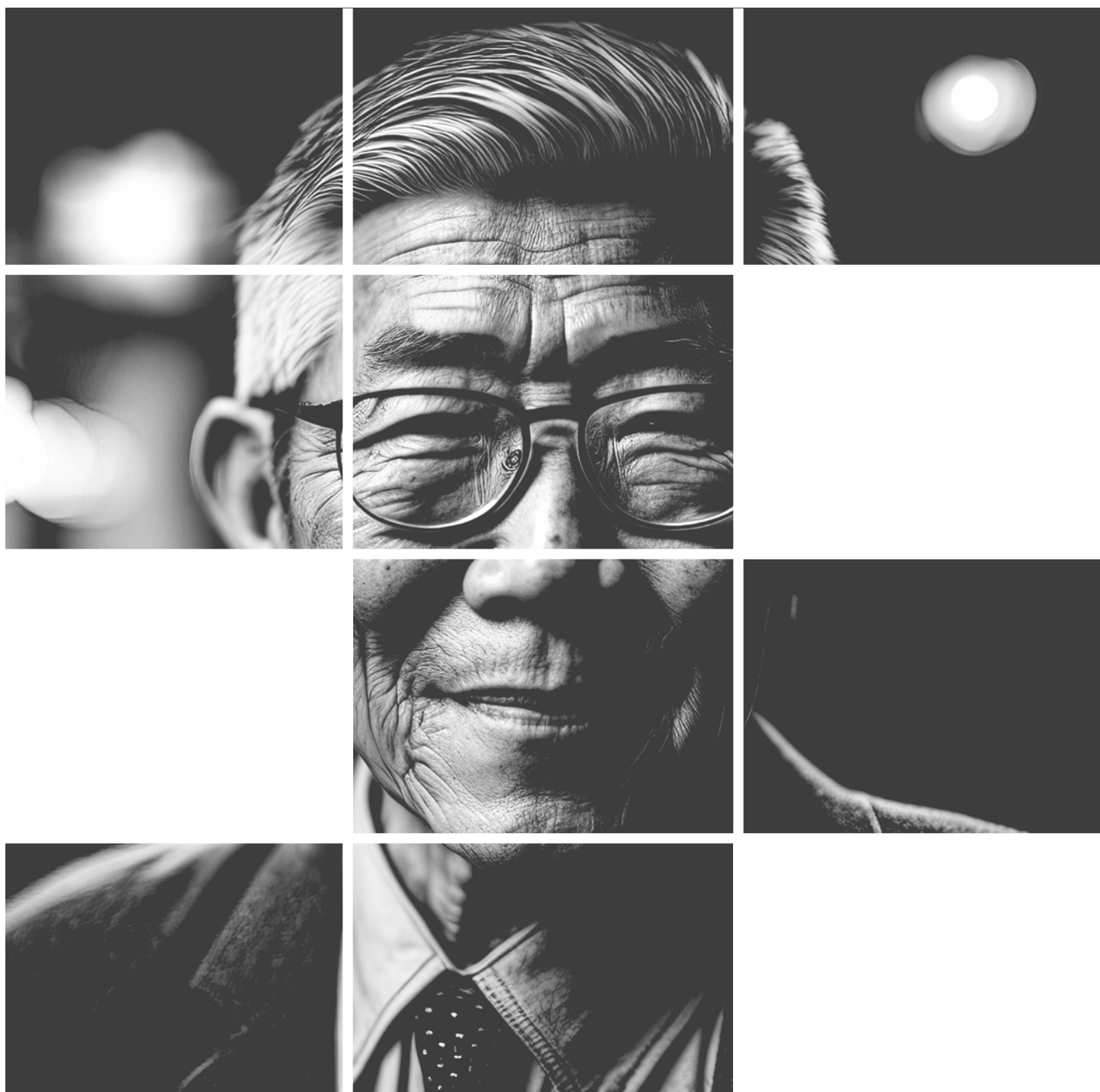
**Sponsored by**



Before you dive into a night out, start your evening with a poolside cocktail and some great company! Join us for a reception at the **East Pool Deck of the Renaissance Palm Springs** for drinks, appetizers, and a beautiful desert sunset over the mountains. Your first cocktail is on us!

# wednesday

november 8



# 8:00 AM – 3:15 PM

Registration

# 7:30 – 8:30 AM

Breakfast

# 8:30 – 10:00 AM

Concurrent Sessions

## Tech-Talk – Keys to Successful Technology Partnerships & Adoption

R N

**Patrice Danaher**, Project Coordinator, Front Porch Center for Innovation and Wellbeing

**Jennifer Lee**, Program Manager, Front Porch Center for Innovation and Wellbeing

While technologies hold the potential to improve operational efficiencies and increase engagement, the process of vetting, selecting and integrating them can be daunting. Hear from a provider team as they demonstrate and discuss methods employed and partnerships built in order to pilot multiple technologies for potential adoption. From robotics, virtual reality and remote monitoring to digital literacy and caregiver training, projects focused on enhancing social connectedness, supporting residents' control over their own health and wellbeing, empowering care circles and fostering safe environments. Gain critical insights and helpful tools to support successful exploration and integration of technologies best suited to your company's and residents' needs.

## Supporting Transgender Residents & Team Members through Allyship

R N BRN

**Sherrill Wayland**, Director of Special Initiatives, SAGE

Transgender older adults are a growing consumer base in search of welcoming and culturally competent long-term care services and supports. At the same time, professionals often cite limited knowledge of how to best to support transgender residents and team members as an area of concern. Join an LGBTQ older adult advocacy expert and explore the role of allyship in recognizing discrimination as well as supporting the inclusion of transgender residents, prospective residents and team members. Gain access to important tools and resources regarding key issues such as room placement, personal care and affirming intake forms.

## Navigate Workforce Injury Claims like a Pro

R N BRN

**Melissa Schafer**, Attorney, Hinshaw & Culbertson LLP

Workplace injuries can be difficult to manage correctly. Join this legal expert for an interactive, up-close look at how best to handle a claim – from the initial injury to resolution and the employee's return to work. Examine various case scenarios and the most common types of injuries, including those considered serious and willful, as well as 132(a) claims and pitfalls to avoid. Walk away with helpful insights and a roadmap of best practices for handling these claims efficiently and effectively.

## It Takes More Than a Taco Truck

R N BRN

**Alan Nelson, EdD**, Professor, Naval Postgraduate School  
**Nancy Nelson**, Executive Director, Belmont Village Calabasas

When well-intentioned leaders solicit ideas to tackle the perennial challenges of staff turnover and low esprit de corps, someone inevitably suggests, "Let's have a taco truck to raise team engagement!" In reality, it takes far more than a taco truck to move (the etymology of *motivation*) people toward action. Join an organizational leadership expert and longtime executive director husband-wife duo and explore key drivers of human behavior, along with best practices to motivate associates. You'll leave equipped with ready-to-use science-based solutions to turnaround turnover issues. Beware, as this may disrupt the status quo!

## The Power of Purpose – Inspiring Meaningful Resident Engagement

R N

**Kathleen Weissberg, OTD**, National Director of Education, Select Rehabilitation

Research shows that those who are occupationally active show positive therapeutic benefits, demonstrate fewer negative behaviors, need less help with self-care tasks, report positive mood and a higher quality of life. Join this occupational therapist and discover the application of the Person-Environment-Occupation (PEO) Model of Care for soliciting individual preferences, interests, hobbies, past occupations and roles, to encourage choice and foster meaningful engagement. Techniques for adapting activities and the environment to continue to meet the needs of changing medical conditions, those with dementia, and the frailest residents will also be offered, along with creative solutions to perceived barriers.

# 10:00 – 10:30 AM

Coffee Break

# 10:30 AM – 12:00 PM

Concurrent Sessions

## Ask the Attorneys

RLR BRN

**Doug Armstrong**, Senior Vice President, Regulatory Affairs & Quality, Belmont Village Senior Living

**Joel Goldman**, Partner, Hanson Bridgett, LLP

**Payam Saljoughian**, Partner, Hanson Bridgett, LLP

Join our esteemed panel of senior living law experts as they delve into a myriad of legal topics impacting providers across California.



Gain invaluable insights into recent issues, emerging regulatory trends and policy changes that shape the landscape. Get your burning questions answered and concerns addressed by our knowledgeable panel, leaving you equipped to proactively navigate challenges and prevent them from escalating into problems.

## Empathy in Motion – Understanding Senior Body Mechanics to Cultivate Compassion

R N

**Donal McGraw**, Regional Director of Wellness Programming, MBK Fit, MBK Senior Living

As the saying goes, “You can't really understand another person's experience until you've walked a mile in their shoes.” Yet every day, staff are tasked to assist residents with getting out of a chair, standing, walking and more without necessarily understanding the mechanics of movement or physical challenges that come with aging. This can lead to improper and unhelpful cuing and frustration for both staff and residents. Join a senior fitness expert to experience and explore the most common movement challenges residents face and learn helpful strategies to support proper body mechanics, reduce the risk of injury and elevate empathy.

## 12:15 – 1:30 PM

Awards Celebration  
Luncheon

Sponsored by



Join us as we honor the Excellence in Service Award recipients – those who go above and beyond to provide outstanding care and service and elevate the experience of residents, employees and the community.

## 1:45 – 3:15 PM

Concurrent Sessions

### Preventing & De-Escalating Violence in the Workplace

R N BRN

**Josef Levy**, Embassy Consulting Services, LLC

As workplace violence remains a continuously growing threat, knowing how to properly employ de-escalation strategies can be the difference between life and death. A communication technique designed to reduce conflict, anger and the potential for future aggression or violence, de-escalation is an effective tool for preventing or diffusing emotionally charged situations. Learn about the various stages of aggressive behavior and the role that emotions and empathy can play during challenging encounters and leave better equipped to handle these situations in both your professional and personal life.

### Leadership Agility Strategies to Navigate Change

R N BRN

**Scott Bush**, President, Bredison and Associates

In this ever-changing business world, leaders are constantly challenged to navigate each obstacle they face with a plan, a culture-first mentality and an agile approach ensuring a strategic roadmap to success. Join a leadership development and training expert to gain insights and skills focused on strategic visionary leadership and change management. Explore motivational drivers, generational factors and helpful ways to heighten awareness and foster accountability during change initiatives while empowering associates to take ownership of the critical role they play in achieving success.

