

LeadingAge® PA

# 2025 ANNUAL CONFERENCE

June 11-13 | Hershey, PA



# IMPACT

**[LeadingAgePAConference.org](https://LeadingAgePAConference.org)**

Register by April 29 for Early Bird Rates!



# JOIN US for Pennsylvania's leading networking and educational opportunity for aging services professionals, the 2025 LeadingAge PA Annual Conference!

## TABLE OF CONTENTS

<a href="#">Schedule at a glance</a>	3
<a href="#">Highlights</a>	5
<a href="#">Pricing</a>	7
<a href="#">Keynote speakers</a>	8
<a href="#">Experiential workshops</a>	9
<a href="#">Full session schedule</a>	11
<a href="#">Sponsors</a>	14
<a href="#">Session descriptions</a>	15
<a href="#">Continuing Education information</a>	35
<a href="#">Hotel Reservation information</a>	38

This best-in-state conference brings together key senior living leaders from across Pennsylvania who represent every part of the aging services ecosystem, along with hundreds of esteemed business partners. We are thrilled to offer this educational, rejuvenating event again this year at the [Hershey Lodge](#) in Hershey, PA!

**Important Change to Registration:** When you register through the Conference website this year, you will be asked to log-in using the same account information that you do for all other LeadingAge PA events, the Learning Portal, and Members Only content on the website! For your convenience, there is no longer a need for separate account information for this event.

We are also excited to offer a one-stop shop for registration experience again this year: Register for the event AND your hotel room all in one place. No need to make your own arrangements with Hershey Lodge separately!

Get ready for a one-of-a-kind experience this year, featuring two incredible Keynote speakers, 53 education sessions, five experiential workshops, 200 exhibitors, networking events, and more.

Read on for even more highlights and opportunities to connect inside.

## Registration is open!

Visit [LeadingAgePAConference.org](https://LeadingAgePAConference.org) to register for the conference and reserve your room at Hershey Lodge today!



Be sure to download the LeadingAge PA Conference mobile app before you head to the conference! All evaluations for continuing education units will be completed on the mobile app, as well as up-to-date schedules, EXPO hall map, and other helpful information.

# SCHEDULE AT A GLANCE

TUESDAY, JUNE 10		
8:00 AM - 3:00 PM	LeadingAge PA Lobby Day and Press Conference at the PA State Capitol (preregistration)	PA State Capitol
3:00 - 7:00 PM	Registration Open	Conference Center Lobby
WEDNESDAY, JUNE 11		
6:30 AM - 5:15 PM	Registration Open	Conference Center Lobby
7:00 - 8:30 AM	Breakfast on your own (on-site dining options available)	
8:30 - 10:30 AM	Opening General Session, Keynote Speaker Ryan Leak	Chocolate Ballroom
10:30 AM - 12:30 PM	EXPO Hall with Lunch available at 11:15 AM	Expo Hall
12:30 - 1:30 PM	Concurrent sessions	Confection Hall Level
12:30 - 2:45 PM	2-hour Workshop: Strengthening Bonds Through Intentional Conversations	Crystal A
1:30 - 1:45 PM	Break	
1:45 - 2:45 PM	Concurrent sessions	Confection Hall Level
2:45 - 3:00 PM	Beverage Break	
3:00 - 4:00 PM	Concurrent sessions	Confection Hall Level
3:00 - 5:15 PM	2-hour Workshop: Experiencing Innovation: Changing the Way We Age	Crystal A
4:00 - 4:15 PM	Break	
4:15 - 5:15 PM	Concurrent sessions	Confection Hall Level
5:15 - 7:00 PM	LeadingAge PA Networking Reception with bites and beverages	Expo Hall
6:30 - 9:00 PM	Fellows in Leadership Alumni Dinner and Graduation (preregistration with fee for guests, non-program alumni)	Cocoa Ballroom
THURSDAY, JUNE 12		
6:30 AM - 5:15 PM	Registration Open	Convention Center Lobby
7:00 - 8:30 AM	Breakfast on your own (on-site dining options available)	
7:15 - 8:15 AM	Film on Aging: "Cycling Without Age: A Journey of Joy and Connection"	Confection Hall Level
8:30 - 10:30 AM	General Session, Keynote Speaker Jia Jiang	Chocolate Ballroom
10:30 AM - 12:30 PM	EXPO Hall with Lunch available at 11:15 AM	Expo Hall
12:30 - 1:30 PM	Concurrent sessions	Confection Hall Level
12:30 - 2:45 PM	2-hour Workshop: Authentic Leadership: Building a Culture That Starts With You	Crystal A
1:30 PM - 1:45 PM	Break	
1:45 PM - 2:45 PM	Concurrent sessions	Confection Hall Level
2:45 - 3:00 PM	Beverage Break	
3:00 - 4:00 PM	Concurrent sessions	Confection Hall Level
3:00 - 5:15 PM	2-hour Workshop: Transforming Conflict to Opportunity	Crystal A
4:00 - 4:15 PM	Break	
4:15 - 5:15 PM	Concurrent sessions	Confection Hall Level
6:00 - 8:00 PM	Distinguished Service Awards Dinner (preregistration with fee)	Cocoa Ballroom
8:00 - 11:00 PM	Jams, Jive & Social Vibes: Supporting Grants & Scholarships Party (preregistration with donation to support the LeadingAge PA Scholarship and Education Fund)	Great American Hall - Red Room

# SCHEDULE AT A GLANCE

## CONTINUED

FRIDAY, JUNE 13		
7:00 AM - 12:00 PM	Registration Open	Conference Center Lobby
7:00 - 8:30 AM	Breakfast on your own (on-site dining options available)	
8:30 - 9:30 AM	Concurrent sessions	Confection Hall Level
8:30 - 10:45 AM	2-hour Workshop: Reshaping the Paradigm for How We View, Experience, and Embrace Dementia	Crystal A
9:30 - 9:45 AM	Beverage Break	
9:45 - 10:45 AM	Concurrent sessions	Confection Hall Level
10:45 - 11:00 AM	Break	
11:00 AM - 12:00 PM	Concurrent sessions	Confection Hall Level

## EXPO HALL HOURS

Wednesday, June 11, 10:30 AM – 12:30 PM

Thursday, June 12, 10:30 AM – 12:30 PM

Enjoy a complimentary lunch with exhibitors in the EXPO Hall on Wednesday (sponsored by [Value First](#)) and Thursday.

And don't miss your chance to network with colleagues, sponsors, and exhibitors during the Networking Reception on Wednesday evening.

Networking Reception Sponsored By:



# HIGHLIGHTS

## PRE - CONFERENCE EVENTS:

### LEADINGAGE PA LOBBY DAY

**TUESDAY, JUNE 10, 2025**

Pennsylvania State Capitol, Harrisburg, PA

Don't miss this chance to play a significant role in advocacy! Attendees will meet with state legislators to express our shared priorities, including the need for funding and solutions to address workforce barriers in aging services. Additionally, they will attend a press conference with LeadingAge PA President and CEO Garry Pezzano, key state legislators, and other members to highlight the significance of supporting our essential sector. [Click here to register.](#)

#### Tentative Schedule:

- 8:00 am, Room #B31: Light breakfast and instructions for the day
- 9:00 am - 3:00 pm: Legislative meetings in small groups
- 11:00 am, Main Rotunda: Press Conference



### SPRING CEO FORUM

**TUESDAY, JUNE 10, 2025**

6:00 – 8:00 pm at Hershey Lodge – Cocoa Terrace

For provider member President/CEOs only. The LeadingAge PA CEO Forum is an exclusive gathering of member President/CEOs designed to spark new leadership insights, provide opportunities to network with like-minded executives, and explore what's ahead in aging services. We will welcome Christine Fares Walley, President of Holleran as our speaker for this forum to discuss "Community Engagement Needs Assessments: How Life Plan Communities Can Broaden Their Influence and Impact Beyond their Four Walls." [Click here to register.](#)

Sponsored by:  

  
**CEO FORUM**

# HIGHLIGHTS CONTINUED

## IN - CONFERENCE EVENTS:

### FELLOWS IN LEADERSHIP ALUMNI DINNER AND 2025 CLASS GRADUATION

**WEDNESDAY, JUNE 11, 2025**

6:30 – 9:00 pm in the Hershey Lodge – Cocoa Ballroom

Reconnect with Fellows in Leadership (FIL) Alumni at this special, celebratory dinner! The FIL class of 2024/25 will graduate and be inducted into the Alumni Council as well. Join us!

**Fee:** All provider members attending the conference are welcome to attend for \$55/person. **The graduating class and FIL alumni may attend free of charge.**

Sponsored by:  **WAGMAN**  
General Construction | Heavy Civil | Geotechnical



### DISTINGUISHED SERVICE AWARDS DINNER

**THURSDAY, JUNE 12, 2025**

6:00 – 8:00 pm in the Hershey Lodge – Cocoa Ballroom

Join us to celebrate this year's Distinguished Service Award recipients – those who've made a positive impact in their communities and on senior services as a whole. After being recognized during the morning's general session, award winners will be honored with this special dinner.

**Fee:** All provider members attending the conference are welcome to attend for \$55/person. **Award winners and one guest may attend free of charge.**

Sponsored by:  **rlps**  
ARCHITECTS



### NETWORKING RECEPTION

**WEDNESDAY, JUNE 11, 2025**

5:15 – 7:00 pm in the Hershey Lodge – Exhibit Hall

One of our most popular events! Catch up with colleagues and say hello to our sponsors and exhibitors while enjoying an adult beverage and an array of hors d'oeuvres. This is a terrific opportunity to make new contacts and build your network. We look forward to seeing you there!

Sponsored by:  **sodexo**

### NEW FOR 2025! JAMS, JIVE & SOCIAL VIBES: SUPPORTING GRANTS & SCHOLARSHIPS

*Join us for a rockin' good time to support the LeadingAge PA Foundation's Education Scholarship Fund, featuring local band, Roustabout!*

**THURSDAY, JUNE 12, 2025**

8:00 – 11:00 pm in the Hershey Lodge – Great American Hall – Red Room

Each year, LeadingAge PA awards Professional Development Scholarships to staff working in our member communities, as well as Internship Grants and Administrator-in-Training Grants to member communities to help grow the next generation of aging services leaders! **Your \$25 contribution** to attend this fun evening party will help make this ongoing initiative possible. In addition, there will be opportunities at the party to support the LeadingAge PA PAC. Any conference attendee, speaker, exhibitor, or sponsor is welcome to register to attend.



Sponsored by:  **LOVE & COMPANY**  **Functional Pathways**  **Optum**  
Therapy that exceeds expectations

# PRICING

## 2025 Annual Conference Registration Rates:

Full Conference – Member – Early Bird by April 29	\$528
Full Conference – Member – After April 29	\$578
Full Conference – Non-Member	\$825
Additional booth exhibitors (over 2)	\$249
Non-exhibiting business members	\$725
Single Day – Member – Early Bird by April 29 (W or Th)	\$297
Single Day – Member – After April 29 (W or Th)	\$330
Single Day – Non-Member (W or Th)	\$430
Single Day – Member – Early Bird by April 29 (F)	\$267
Single Day – Member – After April 29 (F)	\$300
Single Day – Non-Member (F)	\$400



# KEYNOTE SPEAKERS



## WEDNESDAY MORNING KEYNOTE: RYAN LEAK

### Leveling Up: 7 Questions for Next-Level Leadership

Ryan Leak is a dynamic speaker, best-selling author, and strategic advisor renowned for his ability to inspire and transform individuals and organizations. As the CEO of a leadership development firm based in Dallas, Ryan and his team train over 30,000 leaders annually — from Fortune 500 companies to professional sports teams. His unique talent for turning setbacks into opportunities, emphasizing the importance of resilience and the value of learning from failure, makes his teachings impactful and actionable with a splash of humor.

Ryan's passion is helping leaders push past autopilot and level up in their lives and careers. He spreads this empowering message through coaching, speaking, and leveraging the power of video to reach thousands through his online platforms. He is the author of the USA Today bestselling book "Chasing Failure," the Wall Street Journal bestselling book "Leveling Up," and his latest work, "How to Work with Complicated People." His work has been featured in numerous media outlets, including Good Morning America and The Today Show.

With an engaging personality and a deep understanding of human dynamics, Ryan continues to motivate and equip people to overcome challenges and succeed in their endeavors.

Whether through his powerful keynote speeches, best-selling books, or social media presence, Ryan Leak inspires over 50,000 individuals every month to chase their dreams and achieve their full potential.



## THURSDAY MORNING KEYNOTE: JIA JIANG

### The Art of Achieving Ambitious Things

Jia Jiang is the owner of Rejection Therapy, a website that provides inspiration, knowledge and products for people to overcome their fear of rejection. He also teaches people and trains organizations to become fearless through rejection training. In 2015, he authored the Amazon bestselling book, *Rejection Proof: How I Beat Fear and Became Invincible Through 100 Days of Rejection* and was one of the most viewed TED Talks of 2017.

Several years after Jiang began his career in the corporate world, he took a life-altering risk and stepped into the unknown world of entrepreneurship.

His journey revealed a world that was hidden in plain sight — a world where people are much kinder than we imagine. He discovered that rejection can be much less painful than we believe and that the fear of rejection is much more destructive than we know.

Jiang grew up in Beijing, China and migrated to the United States at age 16. He holds a Bachelor of Computer Science from Brigham Young University and a Master of Business Administration from Duke University.

Sponsored by:





# EXPERIENTIAL WORKSHOPS

## RETURNING THIS YEAR!

These five workshops will provide a deep dive into their topics and valuable resources for you to take back to your team and community. Plus, **connect with your Affinity Groups (peer networks) through these experiential learning opportunities**. CEUs are available for all sessions!

## STRENGTHENING BONDS THROUGH INTENTIONAL CONVERSATIONS

Wednesday, June 11, 12:30 – 2:45 PM



**KIERA DESCHAMPS**

CEO/Founder of KD Consulting Group, LLC



**BETH SOUTHORN**

Executive Director, LifeSTEPS

In a world rich with diversity, creating meaningful connections requires courage, openness, and intentionality. This interactive workshop invites participants to explore the power of storytelling and authentic dialogue to foster understanding, empathy, and unity. Through guided activities, reflective discussions, and shared experiences with conscience and deliberate intentionality, participants will learn how to navigate discomfort, celebrate differences, and create safe spaces for transformative conversations. Together, we'll honor the value of every story and build bridges that strengthen our personal and professional relationships.

Hosted by the Leaders of Color network



Sponsored by:



## EXPERIENCING INNOVATION: CHANGING THE WAY WE AGE

Wednesday, June 11, 3:00 – 5:15 PM



**GARRY PEZZANO**

President & CEO, LeadingAge PA



**DOUG LEIDIG**

CEO, Asbury Communities



**JOSEPH DUFFEY**

President & CEO, NewCourtland



**STEVE LINDSEY**

CEO at Garden Spot Communities

Join us for a workshop where participants will experience firsthand innovations shaping the way we age!

This session features a panel of industry leaders who are driving change through investments in age-tech solutions. Panelists will explore core principles essential to successful innovation: affordability, adaptability, and adoption. Doug Leidig, CEO of Asbury, will share insights into his organization's Age Tech Collaborative with AARP and the Smart Senior Living partnership with Integrated Technologies. Participants will then engage in an experiential exercise, exploring innovative solution designs through demonstrations.

Hosted by the IT Affinity Group (peer network)



Sponsored by:



# EXPERIENTIAL WORKSHOPS CONTINUED

## **AUTHENTIC LEADERSHIP: BUILDING A CULTURE THAT STARTS WITH YOU**

**Thursday, June 12, 12:30 – 2:45 PM**

In the senior living industry, leadership stress and employee burnout can significantly impact organizational performance, workplace culture, and resident care quality. This two-hour interactive workshop is designed to help senior living executives develop practical strategies to prioritize their own mental health while fostering a supportive environment for their teams. By addressing both personal and team well-being, leaders can improve employee retention, strengthen workplace culture, and ultimately enhance profitability and operational success.

Participants will explore evidence-based approaches to managing anxiety, supporting staff mental health, and implementing sustainable leadership practices that meet the growing challenges of the senior living industry.

Hosted by the Wellness and Fitness Affinity Group (peer network)  Fitness & Wellness  
Affinity GROUP



**BEN MEYERS**

*Certified Mental Health Consultant*

## **TRANSFORMING CONFLICT TO OPPORTUNITY**

**Thursday, June 12, 3:00 – 5:15 PM**



**ALISA MILLER**

*President & CEO, Kairos Health Systems*



**ANNE MARIE WILLIAMS**

*Senior Director, Kairos Health Systems*



**HEATHER PLUNKETT**

*Consulting Associate, Kairos Health Systems*

This interactive session will help participants harness the power of conflict by transforming destructive behavior into productive responses. By discussing the uncomfortable and unavoidable challenges of workplace conflict, this session combines behavioral theory with self-awareness for a deep dive into conflict. By utilizing Everything DiSC®, a premier personal development learning tool that helps participants better understand themselves and others, participants will be empowered to work better together. Everything DiSC® is powered by almost 50 years of research and ignites organizations to move towards cultural transformation.

Hosted by the Human Resources Affinity Group (peer network)  Human Resources  
Affinity GROUP

## **RESHAPING THE PARADIGM FOR HOW WE VIEW, EXPERIENCE, AND EMBRACE DEMENTIA**

**Friday, June 13, 8:30 – 10:45 AM**

Through a guided exercise, participants will unpack their biases and assumptions about dementia, memory care environments, and associated stigmas. After confronting these assumptions and contrasting them with reality, participants will be challenged to identify how stigma and societal norms have fueled the traditional model of healthcare and created barriers to care. Participants will be asked to reflect on their experiences within their organizations, graph their perceived barriers to care, and rank their perceived challenges in overcoming these barriers. Current issues in the senior living industry, such as staffing shortages, will be highlighted and validated by statistical data and expressed narratives. Juxtaposing the traditional model, participants will be presented with a plan for a new memory center being constructed at Willow Valley Communities.

Hosted by the NHA Affinity Group (peer network)



**LAUREN RENEHAN**

*Executive Director, Willow Valley  
Communities Charitable Foundation*

# FULL SESSION SCHEDULE

	TARGET AUDIENCE	AFFORDABLE HOUSING	ASSISTED LIVING/ PERSONAL CARE	CLINICAL	FINANCE	GOVERNANCE	LIFE	MARKETING/ COMMUNICATIONS	OPERATIONS	SALES	WORKFORCE	ACCREDITATION	NAB	ANCC	ASWB	HRCI	NASBA
Wednesday, June 11   8:30-10:30 a.m. General Session																	
<b>GS-1 Leveling Up: 7 Questions for Next-Level Leadership</b> Ryan Leak																	
Wednesday June 11   12:30-1:30 p.m. Concurrent Sessions																	
<b>01-A QAPI: It's Not for Everyone... Or Is It?</b> Sophie Campbell																	
<b>18-A 2025 Employment Law Update</b> Glenn Davis																	
<b>29-A Senior Living Evolution: Adapting Marketing to Consumer Shifts</b> Kaite Beaver, Elizabeth Fandel																	
<b>40-A Master Planning As Stewardship to Serve and Grow Your Mission</b> Thomas Garvin, Dyan McAlister, Stuart Jackson, Carson Parr																	
<b>46-A Solving for Tension of Mission,Margin &amp; Balancing the Pyramid in Master Planning</b> Ann Cosentino, Emily Pierson-Brown, Patty Embree																	
<b>52-A How Country Meadows Improves Outcomes through Digital Transformation</b> Katie Griffith, Dan Mills, Carol Ditman, Kathy Thomas																	
Wednesday June 11   12:30- 2:45 p.m. Experiential Workshop (15 minute break)																	
<b>09-A Strengthening Bonds Through Intentional Conversations</b> Kiera DesChamps, Beth Southorn																	
Wednesday June 11   1:45-2:45 p.m. Concurrent Sessions																	
<b>02-B You've completed a Capital Study.....Now What?</b> Jennifer Schwalm, Tony Ollmann, Michael Shaw																	
<b>19-B Redefining Senior Housing: The Tower at Henry Avenue – An Inclusive Housing Model</b> Joe Duffey, R. Max Kent, Anne Faullon, Eli Storch, Dyann Roth																	
<b>30-B Embracing the DIGNITY of Resident Relationships</b> Susan Ryan, Liza Behrens																	
<b>41-B Identifying Unmet Needs in Your Region for Potential New Sites and Products</b> Sara Montalto																	
<b>47-B The Value of Value Propositions</b> Allison Cuthie, Scott Miller																	
<b>53-B AI-Enabled Innovation: Enhancing Workforce Retention and Work-Life Balance</b> Angela Green Urbaczewski																	
Wednesday June 11   3:00-4:00 p.m. Concurrent Sessions																	
<b>10-C Getting them, keeping them and helping them to love it! Intentional transitions</b> Sophie Campbell																	
<b>20-C Best Practices for Technology Implementation in Assisted Living</b> Rebecca Tarbert																	
<b>31-C Meeting the needs of older people with opioid use disorder in aging services</b> Ashley Ritter																	
<b>42-C Explode Beyond the Walls of Senior Living</b> Melissa Brown, Michael Shaw																	
<b>48-C Effecting change through faith-based governing boards</b> Diane Burfeindt, Karl Brummer																	
<b>54-C Are The Boomers Living Up To Our Expectations?</b> Christine Walley																	
Wednesday June 11   3:00-5:15 p.m. Experiential Workshop (15 minute break)																	
<b>03-C Experiencing Innovation: Changing the Way We Age</b> Garry Pezzano, Doug Leidig, Joseph Duffey, Steve Lindsey																	

# FULL SESSION SCHEDULE (CONTINUED)

	TARGET AUDIENCE	AFFORDABLE HOUSING	ASSISTED LIVING/ PERSONAL CARE	CLINICAL	FINANCE	GOVERNANCE	LIFE	MARKETING/ COMMUNICATIONS	OPERATIONS	SALES	WORKFORCE	ACCREDITATION	NAB	ANCC	ASWB	HRCI	NASBA
Wednesday June 11   4:15-5:15 p.m. Concurrent Sessions																	
<b>11-D Lifecycle Stages: Strategies for Growth and Regeneration</b> Daniel Godfrey Jr, John Sauder, Jennifer Schwalm																	
<b>21-D Ensuring Compliance with HUD Through the Lens of Financial Statement Audits</b> Jaime Rapps																	
<b>32-D Innovative Interventions: Insights from Leading a Falls Prevention Collaborative</b> Shannon Rose, Abigail Ferris																	
<b>43-D 2025 Long Term Care Provider State and Federal Legal Update</b> David Marshall																	
<b>49-D The Trust Advantage: The Critical Ingredient for Lasting Impact</b> Shanda O'Dennis																	
<b>55-D On the Ground: A Public Take on the Future of Senior Living</b> JD Landis, Sara Montalto																	
Thursday, June 12   7:15 - 8:15 a.m. Film on Aging																	
<b>FOA-1 Cycling Without Age: A Journey of Joy and Connection</b>																	
Thursday, June 12   8:30-10:30 a.m. General Session																	
<b>GS-2 The Art of Achieving Ambitious Things</b> Jia Jiang																	
Thursday, June 12   12:30-1:30 p.m. Concurrent Sessions																	
<b>04-E 2025 LeadingAge PA Government Affairs Update: Progress and Priorities</b> Charles Quinnan, Anna Warheit, Austin Cawley, Emily Kendall-Brown																	
<b>22-E Elevating Dining Satisfaction with Innovative Design and Leading Trends</b> Chadd Roadarmel, Marissa Wynings, Aaron Praetzel, Mike Steil																	
<b>33-E Leading Transformative Change: Strategies for Resident and Team Engagement in Organizational Change</b> Len Weiser																	
Thursday, June 12   12:30-2:45 p.m. Experiential Workshop (15 minute break)																	
<b>12-E Authentic Leadership: Building a Culture That Starts With You</b> Ben Meyers																	
Thursday June 12   1:45-2:45 p.m. Concurrent Sessions																	
<b>05-F Beyond Chicken</b> Kathy Moskowitz, Tracy Malloy																	
<b>23-F Your Affiliation has Closed. What's Next?</b> Tom Meyers, Tammy Young, Brian Hortert, John Sauder																	
<b>34-F How &amp; Why Housekeeping Matters: Infection Prevention to Satisfaction</b> Mark Stibich																	
Thursday June 12   3:00-4:00 p.m. Concurrent Sessions																	
<b>13-G DHS Office of Long-Term Living: Updates on Funding and Services</b> Juliet Marsala, Daniel Sharar, Theresa Hartman																	
<b>24-G Transitional Care Model (TCM) Phase 2: Next step in Care Transitions-SNF to PC</b> Shari Neidich, Constance Carino																	
<b>35-G Securing Payment: Best Practices and Cost-Effective Solutions to Reduce Balances</b> Taylor Nicholas																	
<b>44-G Empowering Leadership Leads to Retention</b> Kirk Rakos, Karen Hammond																	
<b>50-G The Art of Selling and Living in Small Spaces</b> Ric Myers, Dustin Julius, Matthew Barley																	
<b>56-G From Leisure to Wellness: Branching Out Beyond Bingo</b> Jennifer Callahan																	



# FULL SESSION SCHEDULE (CONTINUED)

	TARGET AUDIENCE	AFFORDABLE HOUSING	ASSISTED LIVING/ PERSONAL CARE	CLINICAL	FINANCE	GOVERNANCE	LIFE	MARKETING/ COMMUNICATIONS	OPERATIONS	SALES	WORKFORCE	ACCREDITATION	NAB	ANCC	ASWB	HRCI	NASBA
Thursday, June 12   3:00 -5:15 p.m. Experiential Workshop (15 minute break)																	
<b>06-G Transforming Conflict to Opportunity</b> Alisa Miller, Heather Plunkett, Anne Marie Williams																	
Thursday June 12   4:15-5:15 p.m. Concurrent Sessions																	
<b>14-H AI and Cybersecurity   Navigating the Benefits and Risks</b> Javier Young																	
<b>25-H Department of Health Nursing Facility Updates</b> Jeanne Parisi, Susan Williamson																	
<b>36-H Balancing Quality, Quantity and Value in FY2025</b> Jordan Bicher																	
<b>45-H Dining Redefined: Bridging Resident Expectations in Senior Living</b> Robert Peterson, David Baker, Andrey Teleguz																	
<b>51-H Creating Meaningful Environments and Engagement for Residents with Dementia</b> Elizabeth Eargle, Dixie Colvin, Becky Kandrac																	
<b>57-H Communicating Through Change: Manage Reputation and Goodwill During Milestones</b> Michael Gross, Kevin DeAcosta																	
Friday, June 13   8:30 -9:30 a.m. Concurrent Sessions																	
<b>15-I Patient Safety Organizations – Risk Management approach to Infection Control</b> Geoffrey Gehring, Katie Galasso, J. Matthew Horgan																	
<b>26-I Creating a Volunteer-Friendly Culture: A Blueprint for Success</b> Paul Falkowski																	
<b>37-I Transforming Care: Innovative Approaches in Home Health Care &amp; Hospice</b> Nancy King, Christine Fare Walley																	
Friday, June 13   8:30-10:45 a.m. Experiential Workshop (15 minute break)																	
<b>07-I Reshaping the Paradigm for How We View, Experience, and Embrace Dementia</b> Lauren Renehan																	
Friday, June 13   9:45 -10:45 a.m. Concurrent Sessions																	
<b>16-J Understanding the Legal Implications of End-of-Life Decisions</b> Tanya Harris																	
<b>27-J Driving Quality Leads Through Online Engagement</b> Juanita Fox, Megan Kreider, Mackenzie Herman (Canceled)																	
<b>38-J Incentives 101: Expanding Your Compensation Toolkit</b> Catherine Schweiger																	
Friday, June 13   11:00 a.m. -12:00 p.m. Concurrent Sessions																	
<b>08-K Back to Basics. How to make your resident referral program sexy again!</b> Paul O'Brien, Mike Brindley																	
<b>17-K Gen Z and Beyond! ...in the Workplace: a Deeper Dive</b> Beth Greenberg, Erin McDermott																	
<b>28-K Leveraging Systems and Culture to Support Emotional Wellbeing of Staff</b> Kelly O'Shea Carney (Canceled)																	
<b>39-K Capital Improvements in Occupied Communities</b> Jonathan Grant, Jeremy Philo, Cody Daugherty-Hayes, Andrew Reich																	

# SPONSORS

## PREMIER SPONSORS



WEBBER ADVISORS



LATSHA DAVIS & MARSHALL



ATTORNEYS AT LAW



## PRESENTING SPONSORS



FINANCED RIGHT®



CCL | HOSPITALITY GROUP













LOCKTON®





# SESSION DESCRIPTIONS

KEY:  Marketing/Communications  Clinical  Operations  Finance  Workforce  LIFE  Affordable Housing  
 Governance  Sales  Assisted Living/Personal Care

## TUESDAY, JUNE 10

6:30–8:30 p.m.

### SPRING CEO FORUM

#### GF-1 Community Engagement Needs

#### Assessments: How Life Plan Communities Can Broaden Their Influence and Impact Beyond their Four Walls

This session will introduce the Community Engagement Needs Assessment (CENA) which is designed to uncover a wealth of data around the aging experience in the greater community. The Assessment is key to strategic planning because it provides data to support initiatives and insights related to the needs of older adults in the wider community including the identification of gaps in service and barriers to access for vulnerable populations. **Open to provider member CEOs only.**

## WEDNESDAY, JUNE 11 | GENERAL SESSION

8:30–10:30 a.m.

#### GS-1 Leveling Up: 7 Questions for Next-Level Leadership | Ryan Leak

### KEYNOTE SPEAKER

Ryan Leak is a dynamic speaker, best-selling author, and strategic advisor renowned for his ability to inspire and transform individuals and organizations. As the CEO of a leadership development firm based in Dallas, Ryan and his team train over 30,000 leaders annually — from Fortune 500 companies to professional sports teams. His unique talent for turning setbacks into opportunities, emphasizing the importance of resilience and the value of learning from failure, makes his teachings impactful and actionable with a splash of humor.

Ryan's passion is helping leaders push past autopilot and level up in their lives and careers. He spreads this empowering message through coaching, speaking, and leveraging the power of video to reach thousands through his online platforms. He is the author of the USA Today bestselling book "Chasing Failure," the Wall Street

Journal bestselling book "Leveling Up," and his latest work, "How to Work with Complicated People." His work has been featured in numerous media outlets, including Good Morning America and The Today Show.











## WEDNESDAY, JUNE 11 | CONCURRENT SESSIONS

12:30–1:30 p.m.

#### 01-A QAPI: It's Not for Everyone... Or Is It? | Sophie Campbell

The Centers for Medicare and Medicaid Services (CMS) first promoted QAPI programs in all skilled nursing facilities in 2016. The federal regulation was effective November 2017. Yet many skilled nursing facilities continue to struggle with what the QAPI program should look like and how to make it effective and efficient. Inherent in the QAPI program is process and audits. But this is not as easy as it seems. How do providers include all stakeholders? How are stakeholders made aware of QAPI? How do providers implement PIPs while continuing the work of resident care? Team members in all departments are busy and staffing struggles are real. There is more to do than some departments have time to complete and compliance with regulations is also time consuming. However, QAPI is required by federal regulation. This session will outline what is required by federal regulation and ideas for meeting compliance with the regulation. The session will also address ideas for effective and efficient QAPI programs and processes from education to inclusion to audits.

# SESSION DESCRIPTIONS

KEY:  Marketing/Communications  Clinical  Operations  Finance  Workforce  LIFE  Affordable Housing  
 Governance  Sales  Assisted Living/Personal Care

## 12:30-1:30 p.m. **18-A 2025 Employment Law Update** | Glenn Davis

Employees provide the horsepower for employers in the aging services industry. Supervisory employees at all levels have a need to be up to date on the latest employment and staffing laws and trends. Supervisory nursing staff are on the front lines of employee management and are often the eyes and ears of their employers' Human Resource Departments, which are responsible for compliance with a variety of federal, state, and local regulations, some of which are seemingly inconsistent with one another. Administrators, Supervisors, Managers and other professionals need to be able to spot issues and effectively deal with the ever-changing needs of the work force. The regulatory landscape is in a constant state of flux based on the implementation, administration, and the composition of regulatory agency staff. Attendees will be advised about recent developments in employment and labor law, including the Family Medical and Leave Act, Title VII discrimination cases, pregnancy, non-compete/non-disclosure issues, National Labor Relations Board activity, social media issues, privacy issues, ADA compliance, FMLA best practices and compliance, pregnancy, Employee Handbook, and medical/recreational marijuana. Other areas of emphasis will include litigation settlements and strategies to avoid litigation altogether.

## 12:30-1:30 p.m. **29-A Senior Living Evolution: Adapting Marketing to Consumer Shifts** | Kaite Beaver, Elizabeth Fandel











As we approach the year 2030, the senior living industry is on the brink of a significant transformation, driven by the evolving behaviors of the Baby Boomer generation. By then, every Baby Boomer will be over 65, creating an unprecedented demand for senior housing. These future residents will not engage with senior living communities in the same way as previous generations. Today's 65+ adults are redefining aging by working longer, embracing diverse lifestyles, and prioritizing unique experiences. These shifts challenge traditional assumptions and require a fresh approach for sales, marketing and resident retention. In this session,

we will delve into how our panelist are tailoring their marketing strategies to align with the motivations and expectations of tomorrow's seniors. You will gain actionable insights to position your community as the preferred choice for the modern senior consumer. Join us to explore innovative ways to connect with this dynamic audience and inspire them to choose your community.

## 12:30-1:30 p.m. **40-A Master Planning As Stewardship to Serve and Grow Your Mission** | Thomas Garvin, Dyan McAlister, Stuart Jackson, Carson Parr

The 'why' behind master planning is multi-faceted, but its foundational reason is to help organizations of all shapes and sizes maintain, serve and grow their missions through their physical spaces. Many people have been the fortunate beneficiaries of a built environment that is warm and welcoming, has intuitive wayfinding and ease of navigation, and is purpose built for visitor comfort – creating the desire to return again and again. Almost everyone has had the unfortunate experience of visiting a built environment and being confused by how to find the entrance, exit or navigating in between. These negative experiences are typically due to the absence of master planning – roads, buildings, additions, etc. spring up (or out) in the most convenient and seemingly least expensive locations, only to become pricey roadblocks to necessary future development.

# SESSION DESCRIPTIONS

KEY:  Marketing/Communications  Clinical  Operations  Finance  Workforce  LIFE  Affordable Housing  
 Governance  Sales  Assisted Living/Personal Care

**12:30-1:30 p.m.**  

**46-A Solving for Tension of Mission, Margin & Balancing the Pyramid in Master Planning |** Ann Cosentino, Emily Pierson-Brown, Patty Embree

The perception of, attitude towards, politics surrounding, reimbursement models, and regulatory environments for Skilled Nursing have changed dramatically in the past decade. For organizations to survive, especially nonprofit providers, strategic transformation is crucial. A shift away from traditional Skilled Nursing environments can support a more individualized person-centered approach to older adult care in theory but is challenging to implement. Organizations face innumerable roadblocks, including existing infrastructure, staffing, traditional mindsets towards care, and financial models. In this breakout session, leaders from Vincentian Collaborative System, a 100-year-old nonprofit provider, will explain how they faced this reality across their five Pittsburgh-area campuses and engaged architecture firm Perkins Eastman to lead them through a master planning process to address these challenges. Preserving the Skilled Nursing mission while threading the needle of financial security and evolving to wellness-focused care values to better serve the next generation were fundamental principles. The team used a unique process centering wellness and sustainability to chart potential paths forward. Through short presentations and a conversational-style panel, the presenters will discuss how the Vincentian team engaged in a rigorous process to reorient the organization, assess alternatives for the future, and align choices with their evolved core values.

**12:30-1:30 p.m.**  

**52-A How Country Meadows Improves Outcomes through Digital Transformation |** Katie Griffith, Dan Mills, Carol Ditman, Kathy Thomas

This session will be uniquely structured as a collaborative discussion panel of leaders from Country Meadows to present a compelling case study on their digital transformation journey, focusing on the practical steps and strategies that have led to meaningful innovation within their

communities. The session will be hosted by Katie Griffith, CEO of Bright Solutions, and a panel of senior executives from Country Meadows, who will share firsthand experiences and lessons learned from projects for enhancing communication, efficiency, and resident and staff engagement through technology. Learning Objectives: 1. Understand the Digital Transformation Process: Attendees will gain insights into how senior living operators can embark on a successful digital transformation journey, from initial planning to implementation and continuous optimization. 2. Practical Tips for Implementation: The session will provide actionable strategies for overcoming common challenges in adopting new technologies, such as securing buy-in, managing change, and ensuring sustainable adoption across communities. 3. Real-World Insights: By examining the case study of Country Meadows, participants will learn about the specific technologies and processes used to improve resident experience, operational efficiency, and organizational alignment with strategic goals. Meadows - 2 additional Country Meadows panelists











## WEDNESDAY, JUNE 11 | EXPERIENTIAL WORKSHOP

**12:30-2:45 p.m.**   

**09-A Strengthening Bonds Through Intentional Conversations |** Kiera DesChamps, Beth Southorn

In a world rich with diversity, creating meaningful connections requires courage, openness, and intentionality. This interactive workshop invites participants to explore the power of storytelling and authentic dialogue to foster understanding, empathy, and unity. Through guided activities, reflective discussions, and shared experiences with conscience and deliberate intentionality, participants will learn how to navigate discomfort, celebrate differences, and create safe spaces for transformative conversations. Together, we'll honor the value of every story and build bridges that strengthen our personal and professional relationships.

# SESSION DESCRIPTIONS

KEY:  Marketing/Communications  Clinical  Operations  Finance  Workforce  LIFE  Affordable Housing  
 Governance  Sales  Assisted Living/Personal Care

## WEDNESDAY, JUNE 11 | CONCURRENT SESSIONS

1:45-2:45 p.m.   

### 02-B You've Completed a Capital Study...Now

**What?** | Jennifer Schwalm, Tony Ollmann, Michael Shaw

This session will guide executive management and board members through essential steps to enhance business processes following a capital study. We'll begin with discovery and data gathering, emphasizing stakeholder interviews, organizational governance, and the identification of key areas for improvement. Using insights from these foundational steps, we can establish structured stage gates to serve as the framework for driving business process improvement. Tools like RACI (Responsible, Accountable, Consulted, Informed) diagrams will be explored for their role in clarifying roles and responsibilities, ensuring alignment across the organization. We'll discuss the importance of team collaboration and demonstrate techniques to achieve it, including strategies for building buy-in, solving problems together, and fostering a sense of ownership over process changes. The session will also highlight how connecting people, processes, and tools is critical, where tools are considered the final piece in the puzzle, rather than the starting point. We will demonstrate the importance of balancing people, processes, and tools in business change, as well as considerations for incorporating lessons learned and ensuring sustainability and flexibility in implementing and sustaining effective process improvements. You'll gain insights into integrating these elements into a cohesive strategy that supports effective and lasting change.

1:45-2:45 p.m. 

**19-B Redefining Senior Housing: The Tower at Henry Avenue – An Inclusive Housing Model** | Joe Duffey, R. Max Kent, Anne Faullon, Eli Storch, Dyann Roth

This session will spotlight The Tower at Henry Avenue, an innovative approach to co-developing market rate and affordable housing. Located in Philadelphia's East Falls neighborhood, Henry

Avenue reimagines senior affordable housing through innovative design and thoughtful community integration. This project offers a unique blend of apartments for low-to-moderate-income households, market-rate units, seniors, and units with assistive technology for individuals with disabilities.

Attendees will learn how NewCourtland developed The Tower at Henry Avenue using a combination of equity and conventional project financing, without relying on construction capital from government housing funds. The project is designed for economic sustainability, with rental income supporting operations, maintaining building standards, servicing debt, and providing a fair return on equity investment.

1:45-2:45 p.m. 











### 30-B Embracing the DIGNITY of Resident Relationships

| Susan Ryan, Liza Behrens

Relationships and intimacy are essential for well-being in older adulthood, but they often present challenges for nursing home residents living with dementia — especially when residents are perceived to be exhibiting inappropriate sexual behaviors commonly associated with dementia. The Decision-making in aging and dementia for autonomy (DIGNITY) protocol is a person-centered risk management strategy that was created to assist nursing communities to safely support all residents' preferences for everyday living and care. In this session, three experts in the field of person-directed care will show how the DIGNITY protocol can guide all stakeholders in the nursing home setting — including residents, staff, family members, provider leaders, and regulators — in making decisions that honor individual preferences and foster environments where all elders can experience the emotions and connections that make us all human.



# SESSION DESCRIPTIONS

KEY:  Marketing/Communications  Clinical  Operations  Finance  Workforce  LIFE  Affordable Housing  
 Governance  Sales  Assisted Living/Personal Care

**1:45-2:45 p.m.**    

## **41-B Identifying Unmet Needs in Your Region for Potential New Sites and Products | Sara Montalto**

Faced with ever-growing financial pressures, a senior living organization's most realistic strategy for securing long-term sustainability is growth, and generally in some form of independent living. For many organizations, this imperative to grow includes exploring different types of product options and targeting different economic levels of seniors. The most aggressive organizations tend to think regionally, considering any opportunities within several hours' drive time of the original market. In a state of Pennsylvania's size, the task of identifying and prioritizing potential new locations to explore is a daunting task. Additionally, different product types may make markets that aren't suitable for a typical Life Plan Community an ideal market for a new offering from the organization. New data sources now allow organizations to confidently identify whether they can expect to draw from previously fringe market areas and to predict moving patterns in previously unknown markets. This session will give examples of organizations can follow a few clear steps to narrow search parameters and analyze potential markets efficiently and accurately. Armed with this approach, growth-minded leaders can best prioritize where to focus more detailed site searches and market analyses. The session will also share real case studies of this process from non-profit providers. The opportunity for revenue-generating growth abounds.

**1:45-2:45 p.m.**   

## **47-B The Value of Value Propositions | Allison Cuthie, Scott Miller**

"Facilitate abundant opportunities to live with purpose in community." The marketing team at Garden Spot Village can recite the Resident Value Proposition of Garden Spot Village when prompted without hesitation. As a marketing team, brand identity is important; as a Village community, this proposition is an unparalleled factor for increased occupancy and its organizational health. When visitors come to Garden Spot Village, they enter a warm, open, sunny space, with people of all ages criss-crossing the village square. Coffee-shop











chatter, exchanges over the morning headlines, and warm greetings meet the ears of inquisitive guests. "It just feels different here." Staff hear it often, and can attribute it to multiple things, but one of the most prominent is the value proposition residents pledged to residents when they become a member of the Garden Spot Village community. In 2016, GSV rolled out a Resident Value Proposition that not only focused and consolidated the brand, but it also became a driver for a surge in occupancy. The process was involved and was an effort culminating from resident, staff and community input. In 2022, as they hesitantly emerged into a post-pandemic era, the desire to push through "survival" mode, back into "thriving" mode, meant a different proposition was needed. Most organizations were still reeling from an employment crisis, and while the weight of Garden Spot Village was carried on the shoulders of a strong set of employees, the need and desire to fill in the ranks was a driver in the completion of the current strategic blueprint.

**1:45-2:45 p.m.**     

## **53-B AI-Enabled Innovation: Enhancing Workforce Retention and Work-Life Balance | Angela Green Urbaczewski**

The senior living industry is facing unprecedented challenges in workforce retention and staff burnout. This session will explore how AI-enabled technology offers innovative solutions to these pressing issues. By empowering staff with tools that streamline workflows, reduce hours, and eliminate the need to take work home, AI fosters a healthier work-life balance. The session will also demonstrate how AI-driven insights into resident health enable better-informed decisions, improving both care quality and staff satisfaction. Session Outline: 1. Introduction Overview of current challenges in workforce retention and burnout in senior living. Brief introduction to AI-enabled technologies and their transformative potential. 2. AI-Driven Tools for Enhanced Productivity Discussion of specific AI tools that streamline tasks, automate routine processes, and allow staff to focus on high-impact activities. Examples of how these tools reduce workload, leading to fewer hours and less stress.

# SESSION DESCRIPTIONS

KEY:  Marketing/Communications  Clinical  Operations  Finance  Workforce  LIFE  Affordable Housing  
 Governance  Sales  Assisted Living/Personal Care

## WEDNESDAY, JUNE 11 | CONCURRENT SESSIONS

**3:00-4:00 p.m.**   

**10-C Getting them, keeping them and helping them to love it! Intentional transitions** | Sophie Campbell

This is not a how to hire education session or a develop a recruitment and retention committee session. This session will examine some ideas for intentional transition assistance for nursing team members. There is much data available regarding who enters geriatric nursing in a nursing home and why and what assists them to stay there. There is even more data regarding nursing as a profession and what is happening to our nursing team members. So, we in our Pennsylvania nursing homes must be deliberate and intentional with what we do related to nursing staffing starting with recruitment and extending to retention. A committee alone is not the solution. But what is? So much has been discussed about staff satisfaction and workplace culture regarding retaining nursing team members, especially since the nursing department is present 24/7 and maintains the largest number of team members in the long-term care facility. In long-term care today we have the opportunity to recruit and retain nursing team members, which is absolutely needed.

**3:00-4:00 p.m.**   

**20-C Best Practices for Technology Implementation in Assisted Living** | Rebecca Tarbert

The use of technology in Assisted Living care settings is growing with more technology providers in the marketplace. Not only has the use of technology risen in the general US older adult population considerably in the past 10 years according to Pew Research, but the use of technology in older adult care settings in PA is also growing. In the CAST report "The State of Technology in Aging Services in Pennsylvania", a variety of technologies across older adult settings are described as being introduced with "early adopter" locations. Recognizing that the ultimate goal of technology in the settings is to reduce

the care burden on staff and improving quality of life for residents, the task of implementing a new technology can be daunting for residents and care team members. A novel technology of wearable sensors for avoidance of hip fracture was introduced to 10 assisted living care settings during a clinical trial in 2022-2023. The efficacy and safety of the wearable device was evaluated as the primary trial endpoints demonstrating 90.9% protective effect from hip fractures during serious hip-impacting falls. A secondary analysis following the study that considers caregiver, resident and family input provides a unique understanding of attributes for successful implementation of technology into the care setting. Challenges of staff time for education, translation of education into clinical care management, adoption of technology into everyday care routines were common in the clinical trial as are with many new technologies in today's marketplace. This session will share the clinical study implementation methodology utilized for clinical site location identification, patient screening, care team training and ongoing adherence management.

**3:00-4:00 p.m.**   

**31-C Meeting the needs of older people with opioid use disorder in aging services** | Ashley Ritter

Older adults are the fastest growing segment of people who experience opioid use disorder. At the same time, older adults represent one in five people experiencing homelessness presenting with complex, chronic conditions. Further, substance use and homelessness accelerate the timeline and demand for services to meet daily needs. Without appropriate healthcare, housing, and supportive services, older adults experiencing opioid use disorder, homelessness, or both rely on acute care services like hospitals and temporary housing options like friends or shelters to meet their basic needs. The intersectional needs of older adults with opioid use disorder require aging services and senior housing providers to address documented barriers to health care and housing for this vulnerable population.



# SESSION DESCRIPTIONS

KEY:  Marketing/Communications  Clinical  Operations  Finance  Workforce  LIFE  Affordable Housing  
 Governance  Sales  Assisted Living/Personal Care

**3:00-4:00 p.m.**   

## **42-C Explode Beyond the Walls of Senior Living |**

Melissa Brown, Michael Shaw

With razor thin margins, escalating regulations, and mounting denials, senior living leaders must explore innovative strategies to survive. Implementing a comprehensive ancillary services management approach for both on and off campus clientele can significantly enhance financial performance, diversify risk, and secure long-term stability. By simultaneously incorporating services such as home health, home care, in-house therapy for skilled nursing facilities (SNF) and outpatient clients, and outpatient primary care, senior living communities can boost reimbursement and extend their reach beyond the physical walls of senior living. Serving elders in the community through branded home and community-based services and expanding into more than just one or two HCBS ancillary service lines, senior living providers can make a huge impact on the entire region they serve, while also enhancing new revenue lines. This approach not only benefits the broader community but also improves the quality and coordination of care for residents on campus.

**3:00-4:00 p.m.**  

## **48-C Effecting change through faith-based governing boards |**

Diane Burfeindt, Karl Brummer

In this session, participants will learn about the critical success factors in working with faith-based boards to respect the history and foundation of the organization while remaining relevant and sustainable for the future. Topics include: utilizing board member skillsets and perspectives to respectfully discuss sensitive issues and development alignment and insight; incorporating the role of consumer combined with first-hand experiences of board members to understand how programs and services might evolve to meet the demands of future customers; and developing generative discussions to advance strategic thought and developing a unified direction that continues to move the organization forward. Insights from a member organization, as well as case studies and examples from large and small senior living organizations across the US, will provide practical

insight that attendees can use to ensure the continued success of their organization and a productive relationship with their board. These case studies will include approaches used in various discussions, the pathways that were utilized to move the decision-process forward and the outcomes from the governance work. Identify the critical success factors in working with faith-based boards of directors to ensure the long-term success of aging services organizations











**3:00-4:00 p.m.**    

## **54-C Are The Boomers Living Up To Our Expectations? |**

Christine Walley

Are the Boomers living up to our expectations? For over 10 years the senior living field has been laser focused on preparing our staff and communities to care for the Boomers. We believed that this rapidly growing population would be more demanding, more critical, and less likely to see the value of a senior living community. Coupled with the fact that our communities are already serving 2 to 3 other unique generations, our field struggled to find the answer to what seemed like an impossible question. But what would happen if we discovered that we were completely wrong about the Boomers? Using the latest statistics from across the country this interactive conversation will explore resident occupancy, engagement and satisfaction by generation and dive into what it means for a resident to identify with each unique generational cohort. In conjunction with attendees, we will explore how generational identity affects senior living community operations including sales, marketing, dining, and life enrichment to name a few. Finally, we will share the results of Holleran's ongoing research into the Boomers to highlight how our misconceptions of this generation could be negatively impacting our ability to serve them. Through real responses from Boomers inside senior living communities, we will explore how their generational identity affects their relationship with senior living. Plus, could our misconceptions of Boomers actually be creating their behavior or are Boomers in senior living communities simply adapting to their environment?

# SESSION DESCRIPTIONS

KEY:  Marketing/Communications  Clinical  Operations  Finance  Workforce  LIFE  Affordable Housing  
 Governance  Sales  Assisted Living/Personal Care

## WEDNESDAY, JUNE 11 | EXPERIENTIAL WORKSHOP

**3:00-5:15 p.m.**  

**03-C Experiencing Innovation: Changing the Way We Age** | Garry Pezzano, Doug Leidig, Joseph Duffy, Steve Lindsey

This workshop will avail participants to ‘experience’ innovations that are changing how we age:

1-A panel of leaders with a vision for innovations and making real investments to bring forth innovation in their communities. Among the panelists is Asbury CEO-Doug Leidig to his organization’s Age Tech collaborative with AARP and their Smart senior living partnership with Integrated Technologies, launched at Gaithersburg, MD-based community -Asbury Methodist Village.

2-Generative discussion contemplating core principles: affordability, adaptability, and adoption.

3-Experiential exercise: innovative solutions will be on hand for exploration and demonstration.

## WEDNESDAY, JUNE 11 | CONCURRENT SESSIONS

**4:15-5:15 p.m.**   

**11-D Lifecycle Stages: Strategies for Growth and Regeneration** | Daniel Godfrey Jr, John Sauder, Jennifer Schwalm

Being a mission-driven organization requires a vision for the future, innovative planning, commitment, and focus to achieve ongoing mission attainment. Understanding the lifecycle stages of nonprofit organizations is essential for developing capacity-building strategies for any organization. This session explores how an organization’s lifecycle stage should influence the types of capacity-building, growth and regeneration strategies it pursues. The panel will educate the audience on the core elements of each stage so that participants can identify their organization’s Lifecycle Stage. Building on that framework, the panel will then explore when regeneration strategies are necessary to avoid the “slippery slope” of the “Decline” lifecycle stage. The value-add to this session includes a











member organization’s perspective on its journey through the Nonprofit Lifecycle Stages. Participants will learn how the Board evaluated and decided on capacity-building, growth and regeneration strategies at various stages that have enabled this member organization to extend its “Maturity” Lifecycle Stage and what is next on the strategic horizon. Another essential view will be presented from an architectural/design perspective to provide innovative solutions for capacity-building, growth and regeneration of Aging Services providers. We will also share perspectives from outside of the aging services sector to inspire innovation and creative thinking. Join RLPS Architects, Tandem Living and Baker Tilly for an informative discussion that will explore Mission Attainment from the Nonprofit Lifecycle perspective.

**4:15-5:15 p.m.** 

**21-D Ensuring Compliance with HUD Through the Lens of Financial Statement Audits** | Jaime Rapps

In this critical session for C-suite executives of senior housing, skilled nursing facilities and other entities with U.S. Department of Housing and Urban Development (HUD) financing, we will explore the complex world of HUD compliance through the strategic lens of financial statement audits. As leaders in the senior housing and senior living industries, understanding the nuances of HUD regulations is crucial for optimizing financial performance, maintaining compliance, and ensuring continued access to vital funding. Our expert presenter from Grassi Healthcare Advisors will guide you through the intricate landscape of HUD compliance, focusing on how financial statements serve as both a compliance tool and a strategic asset. This session is designed to equip attendees with practical knowledge and actionable strategies to navigate HUD compliance confidently. Attendees will leave with a deeper understanding of how to use financial statements not just as a reporting tool, but as a strategic instrument for driving financial success in their organization.

# SESSION DESCRIPTIONS

**KEY:**  Marketing/Communications  Clinical  Operations  Finance  Workforce  LIFE  Affordable Housing  
 Governance  Sales  Assisted Living/Personal Care

**4:15-5:15 p.m.**   

**32-D Innovative Interventions: Insights from Leading a Falls Prevention Collaborative |**  
Shannon Rose, Abigail Ferris

The continuous endeavor to prevent falls in aging services is a universal challenge, currently exacerbated by higher acuity, staffing shortages, and regulatory pressures. This session, titled “Innovative Interventions: Insights from Leading a Falls Prevention Collaborative,” aims to equip attendees with valuable knowledge and strategies to enhance falls prevention efforts in their communities. We will begin by exploring the advantages of collaborative learning within aging services. Attendees will gain insights into how organizational collaboration fosters a culture of continuous learning and directly addresses the challenges of sustaining a successful falls prevention program. By sharing experiences and resources, aging services providers can create a synergistic effect that leads to innovative solutions and improved resident outcomes. Next, we will highlight current innovations and best practices in falls prevention.

**4:15-5:15 p.m.**    

**43-D 2025 Long Term Care Provider State and Federal Legal Update |** David Marshall

In 2025, there have been significant legal, statutory and regulatory changes for the long term care industry. The government is expanding its oversight of the industry through the development of several new regulatory mandates. As a result, it is critical for providers to understand these changes and how they may impact the industry. This session will review current legal issues impacting long term care providers. For nursing facility providers, the presenter will discuss the latest developments with respect to the Pennsylvania Department of Health’s revised licensure regulations and will address the impact of those regulations on both operations and the survey and enforcement process. The status of federal and state staffing mandates, and the corresponding legal challenges to those mandates, will be reviewed. The session will discuss recent issues and best practices to aid facilities in preparation for surveys 365 days a year.

**4:15-5:15 p.m.**  

**49-D The Trust Advantage: The Critical Ingredient for Lasting Impact |** Shanda O’Dennis

This session will support participants in understanding and applying the Reina Trust Model, which is built around three core components of trust: Trust of Character, Trust of Communication, and Trust of Capability. These components provide a structured framework for building, maintaining, and repairing trust in any organizational setting. Trust of Character involves establishing reliability and accountability, where people follow through on their commitments. Trust of Communication emphasizes honest, transparent dialogue, fostering open communication within teams. Trust of Capability focuses on trusting individuals’ skills, competence, and contributions, encouraging personal and professional development. During the session, participants will first be introduced to the Reina Trust Model through an interactive presentation that breaks down each of these components, illustrating how they can transform organizational dynamics and improve team collaboration.

**4:15-5:15 p.m.**  

**55-D On the Ground: A Public Take on the Future of Senior Living |** JD Landis, Sara Montalto

This dynamic session delves into public perceptions of senior living, offering a fresh perspective based on real-life interviews and comprehensive survey data. By engaging everyday individuals outside our industry, we uncover valuable insights into how senior living is viewed and how we can better direct both our marketing efforts and the design of physical environments. In this session, we’ll clarify whose voices are represented in our research—whether it’s the general public across all age groups or specific segments like younger Boomers—and how these insights can be applied over a defined time horizon. By specifying whether the data will shape strategies for the next 5 or 10 years, or by analyzing perspectives across multiple age groups, attendees will gain a clearer understanding of the actionable insights being presented.

# SESSION DESCRIPTIONS

KEY:  Marketing/Communications  Clinical  Operations  Finance  Workforce  LIFE  Affordable Housing  
 Governance  Sales  Assisted Living/Personal Care

## THURSDAY, JUNE 12 | FILM ON AGING

7:15-8:15 a.m.

### FOA-1 Cycling Without Age: A Journey of Joy and Connection

*Cycling Without Age* follows the story of a retired teacher, and his group of dedicated volunteers as they use a rickshaw to bring joy and adventure to older adults who can no longer pedal themselves. The film captures the efforts of volunteers who help people rediscover the joys of cycling. This session encourages viewers to reflect on aging, social isolation and mobility.

## THURSDAY, JUNE 12 | GENERAL SESSION

8:30-10:30 a.m.        

### GS-2 The Art of Achieving Ambitious Things | Jia Jiang

## KEYNOTE SPEAKER

Why do we usually fail in achieving our goals? “The bigger the outcome, the bigger the failure rate,” says Jia Jiang. “That’s why New Year’s resolutions usually fail, and why businesses always get too busy to stay focused.” Jia’s proven solution: simplify success by relentlessly focusing on one thing—what he has named the One Action Goal. Drawing from his upcoming book, *The Art of Achieving Ambitious Things* (Simon & Schuster, May 2026), and more than a decade of coaching clients to success, Jia provides a playbook for achieving any personal, professional, or organizational goal. Determined to put success within everyone’s reach, Jia shares his One Action Goal System, including:

- Turning ambitious objectives into your One Action Goal
- Routinizing your dreams and fail-proofing your environment
- Using your One Action Plan to accelerate your ideas
- Developing a radical focus on your One Action Goal

- Overcoming barriers to achievement with a framework for success

## THURSDAY, JUNE 12 | CONCURRENT SESSIONS

12:30-1:30 p.m. 

### 04-E 2025 LeadingAge PA Government Affairs Update: Progress and Priorities | Charles Quinnan, Anna Warheit, Austin Cawley, Emily Kendall-Brown

Join the LeadingAge PA Government Affairs (GA) team as they provide an overview of priorities for the new legislative session building upon the strategic vision set for 2025-2026. Hear strategies being employed to amplify members’ voices throughout the aging services ecosystem as we aim to set the standard for what’s ahead in aging services, including our work to ensure policymakers understand the supports and solutions needed to best position providers to meet the needs of older Pennsylvanians.

In this session, the GA team will bring you up to speed on the most pressing policy issues impacting aging services in Pennsylvania. Our team will give you an inside look at the latest legislative and regulatory updates coming out of Harrisburg and D.C. as we continue to advocate for solutions to help mitigate the workforce crisis, ensure proper investment in the aging services ecosystem, and remove barriers to accessing quality care and supports.

Learn how the ever-changing political landscape impacts advocacy, particularly as we depart from the 2024 general election. We’ll also highlight initiatives that may affect your bottom line as you fight to provide access to quality care in these challenging times.



# SESSION DESCRIPTIONS

KEY:  Marketing/Communications  Clinical  Operations  Finance  Workforce  LIFE  Affordable Housing  
 Governance  Sales  Assisted Living/Personal Care

**12:30-1:30 p.m.**  

**22-E Elevating Dining Satisfaction with Innovative Design and Leading Trends |** Chadd Roadarmel, Marissa Wynings, Aaron Praetzel, Mike Steil

The senior living industry embraces new trends, prioritizing engaging, multi-functional spaces that offer comfort and scalability. Dining environments are shifting towards inviting areas catering to social interaction, wellness, and flexibility. Residents increasingly expect vibrant, modern spaces with varied food options and seamless service experiences. Long-lasting equipment and finishes are essential to maintaining quality and aesthetic appeal in senior living dining spaces. Transitioning from outdated materials to more sustainable, resilient options—like textured vinyl flooring, acoustically treated ceilings, soft lighting, and furniture designed for comfort—enhances functionality and ambiance. Avoiding easily stained fabrics or finishes that deteriorate quickly ensures a cost-effective, long-term solution. The dining facilities at Asbury Springhill underwent a significant transformation, blending aesthetics with functionality. Upgrades included: Aesthetic enhancements: The modernized bar and dining areas have refreshed décor, creating a more inviting and upscale atmosphere. - Biophilic design: Integrating greenery and natural elements with cozy, ergonomic seating to foster well-being and comfort.

**12:30-1:30 p.m.**   

**33-E Leading Transformative Change: Strategies for Resident and Team Engagement in Organizational Change |** Len Weiser

This session explores the critical intersection of executive leadership, change management, and stakeholder engagement—particularly with residents and team members—during periods of significant organizational change.

Drawing from a qualitative study of nonprofit LifePlan Community executives, we'll examine key findings related to how substantive change impacts residents and what strategies executives can use to

increase engagement and acceptance. The session presents a practical, research-informed framework rooted in the ADKAR change model, offering leaders a structured yet flexible approach to guide individuals and teams through transition.

Participants will learn the foundations of effective change management, the psychological and operational dynamics of change, and how to build alignment through transparent communication. The session includes actionable strategies to help leaders strengthen awareness, foster motivation, and sustain progress across their organizations.

## THURSDAY, JUNE 12 | EXPERIENTIAL WORKSHOP

**12:30-2:45 p.m.** 

**12-E Authentic Leadership: Building a Culture That Starts With You |** Ben Meyers

In the senior living industry, leadership stress and employee burnout can significantly impact organizational performance, workplace culture, and resident care quality. This two-hour interactive workshop is designed to help senior living executives develop practical strategies to prioritize their own mental health while fostering a supportive environment for their teams. By addressing both personal and team well-being, leaders can improve employee retention, strengthen workplace culture, and ultimately enhance profitability and operational success.

Participants will explore evidence-based approaches to managing anxiety, supporting staff mental health, and implementing sustainable leadership practices that meet the growing challenges of the senior living industry.

# SESSION DESCRIPTIONS

KEY:  Marketing/Communications  Clinical  Operations  Finance  Workforce  LIFE  Affordable Housing  
 Governance  Sales  Assisted Living/Personal Care

## THURSDAY, JUNE 12 | CONCURRENT SESSIONS

**1:45-2:45 p.m.** 

**05-F Beyond Chicken** | Kathy Moskowitz, Tracy Malloy

Nutrition takes on a profoundly emotional significance for individuals nearing the end of their lives. At this delicate stage, the focus shifts from healing to finding comfort, where every meal can become a cherished moment. Offering nourishing foods that are gentle on the body and rich in flavor can help provide warmth and solace, bringing a sense of peace amidst the uncertainty. Paying attention to personal preferences and familiar tastes transforms mealtime into an intimate experience, allowing loved ones to share memories and create connections. In these tender moments, food becomes more than sustenance; it becomes an expression of love, a way to honor the journey, and a source of comfort that nurtures both body and soul, fostering a sense of dignity and serenity in the final chapters of life. Nutrition at the end of life is a critical aspect of care that significantly impacts comfort and overall quality of life for individuals facing terminal conditions. As the body begins to slow down and systems start to decline, the nutritional needs of patients often change. In many cases, the focus shifts from maintaining a healthy diet to ensuring comfort and minimizing distress, which can profoundly affect both physical well-being and emotional peace. It's important to recognize that the choices surrounding nutrition during this time should prioritize the individual's preferences and desires, helping to preserve their sense of agency. The psychological aspects of eating are also vital.

**1:45-2:45 p.m.**  

**23-F Your Affiliation Has Closed. What's Next?**  
| Tom Meyers, Tammy Young, Brian Hortert, John Sauder

This session will look at two LeadingAge Pennsylvania providers to discuss their real world experience in their merger and affiliation activities. What happens after the affiliation takes place? How

are matters of operational integration undertaken once the two organizations have come together? Additionally a number of softer issues relating to the integration of marketing, cultures, leadership, and stakeholders are other key issues to address to name a few. Hear from two peer Pennsylvania organizations, Concordia Lutheran Ministries and Tandem (fka. Mennonite Home), on their affiliation journeys and how they have navigated from closing to successful operations.

**1:45-2:45 p.m.**  

**34-F How & Why Housekeeping Matters: Infection Prevention to Satisfaction** | Mark Stibich

Our presentation delves into the critical realm of infection control and prevention within healthcare and senior living environments, focusing on the looming threat of antimicrobial resistance (AMR) and its profound implications. By 2050, AMR is projected to become a leading global cause of death, potentially exceeding 10 million fatalities annually, highlighting the urgent need for robust microbial reduction strategies. Beginning by outlining the escalating challenge of AMR, where organisms develop resistance to antibiotics due to overuse and misuse.

Moreover, the presentation explores opportunities to add value for all stakeholders involved—patients, residents, healthcare staff, leadership teams, and state surveyors—by implementing and championing comprehensive infection prevention protocols. Staying at the forefront of emerging trends and advancements in infection control technology and practices, healthcare facilities can position themselves as leaders in providing safe and hygienic environments. The competitive landscape within healthcare and senior living underscores the value proposition of infection prevention in creating hygienic environments.



# SESSION DESCRIPTIONS

KEY: ● Marketing/Communications ● Clinical ● Operations ● Finance ● Workforce ● LIFE ● Affordable Housing  
● Governance ● Sales ● Assisted Living/Personal Care

## THURSDAY, JUNE 12 | CONCURRENT SESSIONS

**3:00-4:00 p.m.** ● ● ●

**13-G DHS Office of Long-Term Living: Updates on Funding and Services** | Juliet Marsala, Daniel Sharar, Theresa Hartman

This session will provide updates from the Department of Human Services' (DHS) Office of Long-Term Living (OLTL) on changes and programs that impact providers' services and funding across the continuum. Hear the latest updates on the status of nursing facility Medicaid (MA) programs, as well as the Living Independence for the Elderly (LIFE) programs. Look ahead with us in preparing for the upcoming transition from RUG to PDPM. Information and reminders will be shared about current state funding opportunities such as quality improvement incentives. Attendees can also take advantage of this opportunity to ask questions about DHS reporting systems, behavioral health service coordination, personal care and assisted living regulatory trends, and more.

**3:00-4:00 p.m.** ● ● ●

**24-G Transitional Care Model (TCM) Phase 2: Next step in Care Transitions-SNF to PC** | Shari Neidich, Constance Carino

This session is the next step in the Dunwoody Village Transitional Care Model. The residents we will be discussing are the same high-risk CCRC residents in Phase 1 but are transitioning from the skilled setting to Personal Care instead of their independent living apartment. Information and methods will be presented, gathered from comparative data; staff, resident and family feedback; and collected from various documentation. The presentation will compare TCM phase 2 participant outcomes vs. those that were not part of the TCM program and if there was an improved resident experience, improved quality outcomes and improved communication and collaboration between levels of care within the CCRC. Quality outcomes will look at success at the Personal Care level in the first 30-days measured by

clinical outcomes such as falls and hospitalizations. Collaboration between levels of care and the impact on the transition will be discussed as well as opportunities for improvement. We will take a look at the effectiveness of the communication methods used in Phase 2 and how successful they were, or if we should be exploring other avenues. Finally, we will be discussing if Phase 2 along with Phase 1, whose presenters will also be present, should be expanded to include residents from outside of the CCRC and how Phase 1 and 2 of the Model would need to change.

**3:00-4:00 p.m.** ●

**35-G Securing Payment: Best Practices and Cost-Effective Solutions to Reduce Balances** | Taylor Nicholas

Long-term care and senior living facilities frequently face complex financial and operational challenges when their residents fail to qualify for Medicaid and cannot pay for necessary services. These issues impose significant strain on both facilities' financial health and its personnel, leading to a decrease in job satisfaction and morale among staff members tasked with handling these situations. The ongoing stress associated with managing these issues can result in staff burnout, high turnover rates, and operational inefficiencies. This continuing education course is designed to equip facility personnel, administrators, and financial officers with effective tools and strategies to navigate the financial difficulties and legal complexities that arise from Medicaid disqualification. Participants will learn practical and proven solutions facilities can leverage to maximize cash flow and reduce burdens on personnel. Attendees will learn overall best practices that can be implemented from a resident's date of admission, through discharge and beyond. Specifically, this course will include guidance on how to best navigate complex Medicaid applications/appeals with the Pennsylvania Department of Human Services, how and when to utilize proactive advocacy in local Orphans' Courts to address issues with incapacitated residents and difficult family members.

# SESSION DESCRIPTIONS

KEY:  Marketing/Communications  Clinical  Operations  Finance  Workforce  LIFE  Affordable Housing  
 Governance  Sales  Assisted Living/Personal Care

**3:00-4:00 p.m.**     

## **44-G Empowering Leadership Leads to Retention**

| Kirk Rakos, Karen Hammond

In today's society, especially in the healthcare setting and since COVID an ongoing critical problem is retention of employees. Once you obtain qualified and enthusiastic individuals the challenge becomes maintaining them as part of your team. The bulk of employee engagement and retention lies in the strength and commitment of leaders. Employees are no longer driven by a paycheck and recognition events. They have a desire to experience quality leadership from leaders who create a culture that delivers inclusion and satisfaction. The role of leadership in influencing employee retention is critical to the success of the organization. This can be achieved when leaders are trusting, effective communicators, empowering and more. Learn how to develop a blueprint of leadership methods that keep teams together since leaders play an undeniably significant role for employee retention.

**3:00-4:00 p.m.**    

## **50-G The Art of Selling and Living in Small Spaces**

| Ric Myers, Dustin Julius, Matthew Barley

As Life Plan Communities look for new ways to meet the increasing demand for Independent Living homes, especially those in the middle market, innovation is key when it comes to design. By re-examining their approach to smaller living options and associated price points, providers can better serve their mission by reaching a more diverse cross-section of the older adult population, including solo agers and those with more modest financial resources. Through this lens, we know that size is not always the determining factor in a unit's marketability and financial success.

This session will provide key takeaways targeted toward middle-market prospects with practical design ideas that can be applied to their individual circumstance. Innovative marketing and sales strategies to make these small homes marketable will be discussed, including how to distinguish these smaller homes as viable options while providing examples of how the overall community becomes an extension of the living quarters.

**3:00-4:00 p.m.**  

## **56-G From Leisure to Wellness: Branching Out Beyond Bingo**

| Jennifer Callahan

Activities programming can be found in almost any type of retirement community; however, wellness programming is typically only seen in assisted and independent living. This session focuses on the importance and value of bringing wellness to the long-term care setting. Wellness is meant to enhance what is already being provided, prevent functional declines, and expand the breadth of how we can provide care for residents. During this session, presenters will lay the groundwork for what wellness programming is, and how it can be beneficial for across settings in our life care communities, including our long-term care residents. Strategies for how to bridge the gap between activities, wellness programming, and therapy services will also be discussed. Attendees will learn how to change their mindset on what wellness programming looks like, who the target demographic is, and why it's beneficial to provide wellness services to residents. Attendees will understand the value and purpose of wellness programming and learn how these services can enhance existing offerings, increase length of stay, and promote continuity of care. Resources for evaluating an existing program will also be reviewed.

# SESSION DESCRIPTIONS

KEY:  Marketing/Communications  Clinical  Operations  Finance  Workforce  LIFE  Affordable Housing  
 Governance  Sales  Assisted Living/Personal Care

## THURSDAY, JUNE 12 | EXPERIENTIAL WORKSHOP

**3:00-5:15 p.m.**  

**06-G Transforming Conflict to Opportunity** | Alisa Miller, Heather Plunkett, Anne Marie Williams

This interactive session will help participants harness the power of conflict by transforming destructive behavior into productive responses. By discussing the uncomfortable and unavoidable challenges of workplace conflict, this session combines behavioral theory with self-awareness for a deep dive into conflict. By utilizing Everything DiSC®, a premier personal development learning tool that helps participants better understand themselves and others, participants will be empowered to work better together. Everything DiSC® is powered by almost 50 years of research and ignites organizations to move towards cultural transformation.

Utilizing videos and both small and large group activities, this personalized learning experience is designed to increase self-awareness around conflict behaviors and give participants tangible take aways to implement into their everyday life.

## THURSDAY, JUNE 12 | CONCURRENT SESSIONS

**4:15-5:15 p.m.**      

**14-H AI and Cybersecurity | Navigating the Benefits and Risks** | Javier Young

Artificial Intelligence (AI) is transforming senior living care by enhancing operational efficiency, improving resident care, and strengthening cybersecurity measures. AI-powered systems can monitor residents' health in real-time, detecting anomalies like falls or sudden changes in vital signs, which allows for prompt medical intervention and improves overall safety. Predictive analytics enable proactive care by analyzing historical health data to foresee potential health issues, reducing hospital readmissions. AI can also automate routine tasks such as scheduling, medication management, and administrative work, freeing up staff to focus

on direct resident care. Additionally, AI is being used to enhance cybersecurity by detecting unusual patterns and potential threats in real-time, preventing data breaches and ensuring the confidentiality of resident information. However, integrating AI in senior living care introduces new risks. Cybercriminals can exploit AI systems to launch sophisticated attacks, potentially compromising sensitive resident data (ePHI).

**4:15-5:15 p.m.** 

**25-H Department of Health Nursing Facility Updates** | Jeanne Parisi, Susan Williamson

The Department of Health Quality Assurance staff will provide updates on regulatory matters. This will include updates on the regulations, identified trends and goals for the coming year.

**4:15-5:15 p.m.**  

**36-H Balancing Quality, Quantity and Value in FY2025** | Jordan Bicher

Skilled Nursing Facility (SNF) operators and providers have long been navigating claim-based and coding-based measure updates. With recent changes now finalized, it's time to reassess and adjust strategies for delivering measurable, impactful outcomes. This seminar will cover the latest updates to the SNF 5-Star Quality Measures and the Quality Reporting Program (QRP). The speaker will also explore Value-Based Care, offering insights on fostering cross-setting collaborations to improve care coordination. Additionally, the session will highlight the role of innovation and technology in shifting the focus from traditional healthcare to a more holistic view of health. As the landscape evolves, post-acute care providers can no longer afford to "catch up"—the future demands a proactive approach that redefines wellness as a driving force for sustainable, high-quality care.

# SESSION DESCRIPTIONS

KEY:  Marketing/Communications  Clinical  Operations  Finance  Workforce  LIFE  Affordable Housing  
 Governance  Sales  Assisted Living/Personal Care

**4:15-5:15 p.m.** 

**45-H Dining Redefined: Bridging Resident Expectations in Senior Living |** Robert Peterson, David Baker, Andrey Teleguz

The senior living industry is experiencing a significant transformation, driven by changing market dynamics and evolving resident expectations. Today's seniors are not only looking for a place to live; they seek environments that enhance their quality of life and reflect their diverse lifestyles and preferences. As a result, senior living communities are being pushed to adapt at an unprecedented pace, moving beyond traditional models to meet the needs of a new generation of residents. Central to this evolution is the dining experience. In the past, meals in senior living facilities often revolved around basic offerings, but now, residents expect a broader range of choices that cater to their tastes and dietary requirements. This shift has prompted many organizations to rethink their dining amenities, creating venues that vary from casual settings to elegant, fine dining experiences. By offering unique and experiential atmospheres, communities are not only enhancing the dining experience but also fostering social interactions among residents, which is vital for their overall well-being. In this session, we will delve into how senior living organizations can effectively bridge the gap between traditional expectations and the modern demands of incoming residents. We will explore the various pressures the industry is facing, such as increasing competition, changing demographics, and the need for greater flexibility in service offerings.

**4:15-5:15 p.m.**  

**51-H Creating Meaningful Environments and Engagement for Residents with Dementia |** Elizabeth Eargle, Dixie Colvin, Becky Kandrac

Masonic Village at Elizabethtown is a skilled nursing facility in Elizabethtown, PA that offers three secure memory support neighborhoods (i.e. units) designed to support resident needs as their dementia progresses. Residents in the early stages of dementia are admitted to a more independent

environment and then move to neighborhoods that support moderate and advanced stages. To help staff effectively communicate with residents, the therapy team completes an evaluation to "stage" the residents and provides interaction suggestions based on their identified stage. We will discuss a variety of changes and tools integrated to improve quality of life for those living with dementia. These include interior and exterior changes such as a move to private rooms, the addition of outdoor water features, and encouraged use of outdoor spaces that are accessible to residents and families. We will also focus on the importance of involving the resident, family, and personal preferences into daily care. A dementia support group is offered monthly for care givers that fosters connection and helps to better understand disease progression. A dementia resource room was created where they can meet with staff to in a quieter place or process difficult visits. We encourage families to engage in day-to-day activities and special seasonal events, providing structure that makes it easier to connect.







**4:15-5:15 p.m.** 

**57-H Communicating Through Change: Manage Reputation and Goodwill During Milestones |** Michael Gross, Kevin DeAcosta

The senior-living sector is in an evolutionary time, where organizations of all sizes and structures are changing the ways they do business. Breaking the mold of a single site provider – where so many are being acquired or eliminating service lines, The Highlands at Wyomissing's leadership took things in a much different direction to both ensure financial independence and explore new areas of revenue and growth. But how do you maintain the trust you have built with your most important audiences – your residents, their families, your staff, your supporters and your partners – in times of change? During this presentation, The Highland's CEO and its partner agency leader will delve into practical examples, drawn from real-life experiences to illustrate how positive public relations initiatives can make a substantial difference in both good times and tough times.



# SESSION DESCRIPTIONS

KEY:  Marketing/Communications  Clinical  Operations  Finance  Workforce  LIFE  Affordable Housing  
 Governance  Sales  Assisted Living/Personal Care

## FRIDAY, JUNE 13 | CONCURRENT SESSIONS

8:30-9:30 a.m.   

### 15-I Patient Safety Organizations – Risk Management Approach to Infection Control |

Geoffrey Gehring, Katie Galasso, J. Matthew Horgan

This presentation plans to open with an overview of the Patient Safety and Quality Improvement Act of 2005. Attendees will be informed on the following:

(1) confidentiality and privilege protections for informational meetings, reported events, and quality initiatives; (2) Definition of Patient Safety Work Product; (3) Overview the authority of the AHRQ; and (4) Understanding the network of patient safety databases (NPSD). The program will then apply that overview to risk management techniques to consider the myriad of ways to apply the PSO protection to an organization: (1) Minimize the impact from sentinel events that occur in the organization; adapt to the erosion of the Peer-to-Peer protection in PA; (2) Develop an assessment tool to utilization in assisting the organization on “How to Choose a Patient Safety Organization”; and (3) Overview the access of resources and education from a PSO. The program will close with a practical example from a member SNF/PC regarding infection control practices that are impacted by an appropriately developed Patient Safety Work Product with clinical practices. The focus will be to present the challenges of implementation and lessons learned. Attendees will then be able to ask questions for response from the panel.

8:30-9:30 a.m.    

### 26-I Creating a Volunteer-Friendly Culture: A Blueprint for Success | Paul Falkowski

This session will explore how long-term care communities can build and sustain a volunteer-friendly culture that enhances resident well-being and organizational performance. Drawing on research and examples from the National Association of Long-Term Care Volunteers (NALTCV), this presentation will offer practical guidance on recruiting, training, and retaining volunteers while

integrating them effectively into care teams.

We will wrap up with key takeaways and actionable steps for attendees to implement a volunteer-friendly culture in their organizations. By the end of this session, participants will understand how to build a culture that supports volunteers and improve both resident care and staff satisfaction through sustainable volunteer management practices.

8:30-9:30 a.m. 

### 37-I Transforming Care: Innovative Approaches in Home Health Care & Hospice | Nancy King, Christine Fare Walley

This engaging session will explore the latest trends and innovative strategies in Home and Community-Based Services (HCBS) specifically, home health, hospice, and private duty that enhance the quality of life for older adults. We will utilize the insights from a Holleran Survey, which captures the perspectives of LeadingAge Life Plan Communities, to understand the barriers, trends, and challenges these communities face in implementing HCBS. The session will emphasize collaborative approaches that foster independence and support holistic care for older adults. Participants will learn how to effectively implement and manage home health, hospice, and private duty operations within their organizations about practical applications, and emerging best practices. The session will emphasize collaborative approaches that foster independence and support holistic care.

# SESSION DESCRIPTIONS

KEY: ● Marketing/Communications ● Clinical ● Operations ● Finance ● Workforce ● LIFE ● Affordable Housing  
● Governance ● Sales ● Assisted Living/Personal Care

## FRIDAY, JUNE 13 | EXPERIENTIAL WORKSHOP

8:30-10:45 a.m. ●

**07-I Reshaping the Paradigm for How We View, Experience, and Embrace Dementia** | Lauren Renehan

Through a guided exercise, participants will unpack their biases and assumptions about dementia, memory care environments, and associated stigmas. After confronting these assumptions and contrasting them with reality, participants will be challenged to identify how stigma and societal norms have fueled the traditional model of healthcare and created barriers to care. Participants will be asked to reflect on their experiences within their organizations, graph their perceived barriers to care, and rank their perceived challenges in overcoming these barriers. Current issues in the senior living industry, such as staffing shortages, will be highlighted and validated by statistical data and expressed narratives. Juxtaposing the traditional model, participants will be presented with a plan for a new memory center being constructed at Willow Valley Communities. The plan for this new dementia village employs a social model for care and reflects elements that have been successfully demonstrated in Europe. Critical components for operating from this habilitative perspective include small households, unique staffing ratios, neighborhoods with identities, familiar destinations, and intentionally designed architecture with built-in wayfinding clues.

well as the legal and practical issues regarding a resident's code status. The presenter will discuss strategies and best practices for resolving disputes between co-agents under a health care power of attorney and will also provide step-by-step guidance to address situations where a resident lacks decision making capacity and has no advance health care directive. This session will also examine the risk management issues to be considered regarding the utilization of the POLST form and proactive steps providers can take to reduce potential liability.

9:45-10:45 a.m. ● ●

**27-J Driving Quality Leads Through Online Engagement** | Juanita Fox, Megan Kreider, Mackenzie Herman (**Canceled**)

## FRIDAY, JUNE 13 | CONCURRENT SESSIONS

9:45-10:45 a.m. ● ●

**16-J Understanding the Legal Implications of End-of-Life Decisions** | Tanya Harris

As residents near the end of life, long term care providers need to be aware of the various legal issues that can arise with respect to health care treatment decisions. This session will address the laws governing advance health care directives as



# SESSION DESCRIPTIONS

KEY: ● Marketing/Communications ● Clinical ● Operations ● Finance ● Workforce ● LIFE ● Affordable Housing  
● Governance ● Sales ● Assisted Living/Personal Care

**9:45-10:45 a.m.** ● ● ● ●

## **38-J Incentives 101: Expanding Your Compensation Toolkit** | Catherine Schweiger

Incentive compensation can be used to motivate desired behaviors, drive results, and attract top talent. What do you need to know to effectively leverage this compensation element? What types of organizations use incentives and in what amounts? Would incentive compensation benefit your organization? How should it be structured? What are suggested safeguards? Join us to explore the how, what, and why of incentive compensation.

## **FRIDAY, JUNE 13 | CONCURRENT SESSIONS**

**11:00 a.m. -12:00 p.m.** ● ●

## **08-K Back to Basics. How to make your resident referral program sexy again!** | Paul O'Brien, Mike Brindley

Video marketing. Chat bots. Content syndication. Interactive content. All the new ways to get more leads to your inbox. But that's the problem. Leads go to your inbox instead of a living breathing person standing in your doorway. But despite them being your best, least costly and most productive lead source, resident referral programs often take a back seat to all the shiny new lead generation methods. In this presentation, attendees will hear first-hand experience from sales and marketing experts how to breathe new life into your referral program and make it both fun and rewarding for residents as well as an integral part of your marketing strategy and culture. Speakers will illustrate the 'myths and excuses' used by residents and sales teams alike as to why referrals 'don't work' and share strategies to overcome resistance from residents. Attendees will hear why resident satisfaction is key to a successful referral program and learn how to obtain resident testimonials to use in successful campaigns. Attendees will learn why your newest residents are the best source of referrals and when is the right time to approach new residents, the role of your move-in coordinator as well as leadership in ensuring the success of the program. The

presentation will share ideas of lively events from housewarming parties, chef's table events and wine and food pairings, that can be tailored to both the comfort and interest of the resident and prospect, and to showcase the life of your community. Ideas will include how to design a rewards program to offer different types of incentives, and how to continually promote your program to keep it top of mind for residents.




**11:00 a.m. -12:00 p.m.** ● ●

## **17-K Gen Z and Beyond! ...in the Workplace: a Deeper Dive** | Beth Greenberg, Erin McDermott

We will begin by providing background information about what researchers are discovering about Gen Z as they begin their work experiences and the forces that are shaping upcoming Gen Alpha's experience. Building on our preliminary survey results of Gen Z and Millennial college students regarding what they are looking for in their careers, we propose to modify and conduct a survey using an improved sampling frame and updated questions. We will conduct interviews to delve more deeply into students' thoughts and values around issues uncovered in our initial survey such as transparency, workplace culture, benefits, and meaningful work. Further, we will discuss potential opportunities for members to work with Career Services staff on university campuses to promote senior living positions with Gen Z.

# SESSION DESCRIPTIONS

KEY:  Marketing/Communications  Clinical  Operations  Finance  Workforce  LIFE  Affordable Housing  
 Governance  Sales  Assisted Living/Personal Care

**11:00 a.m. -12:00 p.m.**     
**28-K Leveraging Systems and Culture to Support Emotional Wellbeing of Staff** | Kelly O'Shea Carney  
(Canceled)

in many ways most critical, party in any capital improvements project is the residents. The voices of those who will be impacted by the construction and utilizing the final project should be heard throughout the project process.

This session will include testimony from residents who recently experienced occupied repositioning projects to hear their feedback on the holistic project experience.

**11:00 a.m. -12:00 p.m.**    
**39-K Capital Improvements in Occupied Communities** | Jonathan Grant, Jeremy Philo, Cody Daugherty-Hayes, Andrew Reich

With elevated land and construction costs, operators continue to turn toward acquisitions, asset repositioning, and capital improvements as means of increasing and improving their portfolios. The complexities associated with occupied construction projects require significant planning and scheduling among the project team to ensure minimal disruption to existing residents. In addition to the impact on the residents, the project team needs to consider the speed to market for any repositioning projects to limit the overall financial consequences due to the unoccupied resident rooms and amenity areas. At Acts Retirement-Life Communities, an internal construction company, Acts Construction, completes many of the cap-ex projects across their portfolio. The integration of operator and contractor provides for more seamless constructability review prior to the project progressing into comprehensive design. This partnership also allows for more rapid response times on emergent or pivotal projects. The design team partnership with any operator and/or developer plays a critical role in the design phase of the projects. Design professionals need to understand not only the existing building and site conditions, but they also need to understand the operations needs in the final project. The design team can play a role in translating the resident committee feedback to the operations and development teams to find a common ground in the final design package. The final, and

# CONTINUING EDUCATION INFORMATION

All evaluations for continuing education units will be completed on the LeadingAge PA Annual Conference mobile app.

**THIS EDUCATIONAL CONFERENCE IS JOINTLY PROVIDED BY:**



## ACCREDITATION STATEMENT

In support of improving patient care, this activity has been planned and implemented by AXIS Medical Education and LeadingAge PA. AXIS Medical Education is jointly accredited by the Accreditation Council for Continuing Medical Education (ACCME), the Accreditation Council for Pharmacy Education (ACPE), and the American Nurses Credentialing Center (ANCC), to provide continuing education for the healthcare team.

## CREDIT DESIGNATION FOR NURSING

AXIS Medical Education designates this continuing nursing education activity for **9.0 contact hours**.

*Learners are advised that accredited status does not imply endorsement by the provider or ANCC of any commercial products displayed in conjunction with an activity.*

## SOCIAL WORKERS

As a Jointly Accredited Organization, AXIS Medical Education is approved to offer social work continuing education by the Association of Social Work Boards (ASWB) Approved Continuing Education (ACE) program. Organizations, not individual courses, are approved under this program. State and provincial regulatory boards have the final authority to determine whether an individual course may be accepted for continuing education credit. AXIS Medical Education maintains responsibility for this course. Social workers completing this course receive a maximum of **8.0 continuing education credits**.



## LONG TERM CARE ADMINISTRATORS

This program has been approved for Continuing Education for **15 total participant hours by NAB/NCERS—Approval #20260609-64-A112612-IN**

## PERSONAL CARE HOME ADMINISTRATORS

As a NAB certified sponsor, LeadingAge PA can offer continuing education credits for PA personal care home administrators only in content areas from the domains of Practice for Residential Care/ Assisted Living core of knowledge. According to the revised 2011 DPW regulations for personal care home administrators, DPW will accept courses approved by the National Administrators Board/ National Continuing Education Review Service. A final list of applicable sessions will be available at the conference.

# CONTINUING EDUCATION INFORMATION

## HUMAN RESOURCES

This activity has been approved for 17.5 HR (General/Business) recertification credit hours toward aPHR™, PHR®, PHRca®, SPHR®, GPHR®, PHRi™ and SPHRi™ recertification through HR Certification Institute® (HRCI®). Please make note of the activity ID number on your recertification application form. For more information about certification or recertification, please visit the HR Certification Institute website at [www.hrci.org](http://www.hrci.org).



Sessions awarding credit: GS-1, 09-A, 18-A, 52-A (Business), 47-B, 53-B, 10-C, 42-C, 54-C, 49-D, 12-E, 22-E, 06-G, 44-G, 14-H, 26-I, 28-K, 17-K

## FINANCE PROFESSIONALS

Earn **14.4 maximum CPE credits**

Available:

- 1.2 Business Law 21-D, 43-D
- 6.0 Business Management & Organization 40-A, 46-A, 02-B, 41-B, 03-C, 42-C, 11-D, 38-J
- 1.2 Computer Software & Applications 14-H
- 2.4 Personal Development GS-1, GS-2
- 3.6 Personnel/Human Resources 23-F, 06-G, 13-G, 44-G



AXIS Medical Education is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State Boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of Sponsors through its website: [www.nasbaregistry.org](http://www.nasbaregistry.org)

Field of Study: Specialized Knowledge, Business

Law, Information Technology, Business Management & Organization and Personal Development

Delivery Method: Group-Live

Prerequisite: Prior knowledge in the area of Healthcare, Medicare and Medicaid Services

Program Level: Intermediate

Advanced Preparation: None

*Please Note: CE credits can only be obtained for one session per time frame.*

## AXIS CONTACT INFORMATION

For information about the accreditation of this program please contact AXIS at [info@axismeded.org](mailto:info@axismeded.org).

*Requirements for Credits*

- Attend the educational activity and review all course materials.
- After each session, complete the session/speaker evaluation using the LeadingAge PA mobile app.
- After the conclusion of the conference, participants will enter an electronic portal through Axis Medical where they will attest to attendance and participation in their identified sessions and print their certificate of attendance. Instructions for this portal will be emailed to all attendees after the conference.
- The electronic CE Attestation portal must be completed online by 11:59 pm ET July 13, 2025. If you do not enter the online portal by the above date, you will not be able to retrieve your statement of participation.
- Participants will obtain their certificates through the Axis Medical portal. For NAB and PCHA CE certificates, please visit <https://www.nabweb.org/manage-my-account> within 30 days after the conference.

Please visit <https://www.nabweb.org/manage-my-account> within 30 days after the conference.



# DISCLOSURE OF CONFLICTS OF INTEREST

AXIS Medical Education requires instructors, planners, managers, and other individuals and their spouse/ life partner who are in a position to control the content of this activity to disclose any real or apparent conflict of interest they may have as related to the content of this activity. All identified conflicts of interest are thoroughly vetted by AXIS for fair balance, scientific objectivity of studies mentioned in the materials or used as the basis for content, and appropriateness of patient care recommendations.

The following faculty of the 2025 LeadingAge PA Annual Conference reported no relevant financial relationships or relationships they have with ineligible companies of any amount during the past 24 months: *coming soon*

The following **directors, planners, managers, and reviewers** of the 2025 LeadingAge PA Annual Conference reported no financial relationships they have with any ineligible company of any amount during the past 24 months:

LaJeune Adams	Wendy Johnson
Katie Andreano	Shannon Kidd
Nicole Bowser	Marianne Lake
Maryanne Brawley	Brian Levesque
John Bulger	Michelle Lobello
Scott Burkholder	Lorna Malawi
Meg Clouser	Erin McDermott
Lindsay de Bien	Natalie MacDonald
Vicki Deitzler	Matthew Mayo
Niamh Fabiszewski	Alisa Miller, CPA
Andrea Gibson	Kimberly Ranck
Jo Anne Hartman	Janet Schultz, MSN, RN, FACEHP, CHCP
Angela Heisey, RN	Megan Stedjan, LCSW
Jonathan Hollinger	Rachel Wachter
Jennifer Hodge	Anna Warheit

## DISCLAIMER

Participants have an implied responsibility to use the newly acquired information to enhance patient outcomes and their own professional development. The information presented in this activity is not meant to serve as a guideline for patient management. Any procedures, medications, or other courses of diagnosis or treatment discussed in this activity should not be used by clinicians without evaluation of patient conditions and possible contraindications on dangers in use, review of any applicable manufacturer's product information, and comparison with recommendations of other authorities.

# HOTEL RESERVATION INFORMATION



With excitement and anticipation, the LeadingAge PA Annual Conference returns, by popular demand, to the Sweetest Place on Earth, Hershey, Pennsylvania.

**The Hershey Lodge**  
**325 University Drive**  
**Hershey, PA 17033**

The Hershey Lodge is the official site for the 2025 LeadingAge PA Annual Conference. Hershey and the surrounding area offer a unique blend of both professional and leisure opportunities, making it an attractive destination for conference attendees.

For area information, go to [Visit Harrisburg Hershey](#), or park and relax at the deluxe Hershey Lodge. You can't go wrong either way.

## HOTEL RESERVATIONS

**RETURNING THIS YEAR – One-stop shop registration!**

Rooms at the Hershey Lodge remain available for Monday, Tuesday, and Thursday nights. While our contracted rooms for Wednesday night are now full, nearby overflow hotel options are listed below for your convenience.

### Hershey Lodge Registration:

To make your hotel reservations with the LeadingAge PA discounted rate of \$354/night (Monday, Tuesday) and \$399/night (Thursday) plus taxes, complete your conference registration, and book your hotel room! Complete your room reservation at [LeadingAgePAConference.org](#) by **no later than Tuesday, April 29** to receive the discounted rate. No need to contact the resort directly to make reservations. You will receive your hotel confirmation number **after May 7**. Hotel reservations made **after the April 29** deadline will be subject to hotel availability at the discounted rate. After April 29, please call 1-855- 729-3108 and ask for group: LeadingAge PA.

## HOTEL CHANGES AND CANCELLATIONS

**Until April 29**, to modify or cancel your reservation, please use the same link used to make your reservation by visiting the LeadingAge PA conference registration site. Click 'manage existing reservations' and enter your registration number.

**After May 7**, please call the Hershey Lodge directly at 1-855-729-3108 to modify or cancel your reservation. Changes/cancellations may be made up to 72 hours before your arrival date. Reservations canceled within 72 hours of the arrival date will incur a one-night charge plus tax..



LeadingAge® PA

# 2025 ANNUAL CONFERENCE

**THIS EDUCATIONAL CONFERENCE IS JOINTLY PROVIDED BY:**



**Save the date for the 2026 Annual Conference: May 11 - 13 in Hershey, PA!**



1100 BENT CREEK BOULEVARD, MECHANICSBURG, PA 17050

[LEADINGAGEPACONFERENCE.ORG](https://LEADINGAGEPACONFERENCE.ORG) | [EDUCATION@LEADINGAGEPA.ORG](mailto:EDUCATION@LEADINGAGEPA.ORG)