



October 14-17, 2010
The Westin South Coast Plaza

PROGRAM OF EVENTS

Updated 8/3/10

Thursday, October 14th

8:30 a.m. to 12:00 p.m.

Pre-Conference Intensive: Managing the Challenging Behaviors of Elders with Personality Disorders *(Fee is \$95 if registered by 9/10/10)*

Category: Clinical Issues / Audience: All Levels / NACCM Credit: TBD

Providing services to elders often poses many challenges to a geriatric care manager. In addition to helping the client adapt to myriad physical, psychological and social losses associated with aging, we also have to contend with underlying personality traits and disorders that affect the ability to cope with illness, disability and receiving care. The session will utilize didactic and experiential methods to help us recognize how personality styles and disorders cause challenging behaviors as well as how our reactions to these behaviors impact our work with our clients. Through case discussions we will look at techniques to manage the challenging behaviors of this population, prevent staff burnout and compassion fatigue, and offer more effective interventions that improve outcomes and reduce resistance.

Session Objectives: 1. Participants will learn about personality disorders in older clients and summarize why personality disorders may be undiagnosed in older or chronically ill adults. 2. Participants will learn how the stressors of illness, disability, and aging impact the behaviors of clients with specific personality traits and disorders. 3. Participants will be able to assess and critique their treatment plan to determine whether they have “goodness of fit” interventions and realistic, obtainable goals to avoid resistance to services. 4. Participants will learn the psychological theory of counter-transference and learn to recognize its positive and negative impact on our work. 5. Participants will learn techniques for self-care to avoid professional burnout and compassion fatigue.

Presenter: Judith A. Shultz, Shultz Consulting Services

Bio: Judith A. Shultz, MA, LMFT, has spent much of her career working in the field of aging, as the Director of a Congregate Meals Program at the Israel Levin Center. While at the center, Judith participated in the Academy Award winning film “*Number Our Days*”. In 1980 she began her long career at Jewish Family & Children’s Service of Long Beach/ West Orange County (JFCS) where she worked as a clinician, Director of Older Adult Services and finally as Executive Director until her retirement in August 2004.

1:00 to 5:00 p.m.

WRC-NAPGCM Board Meeting/Retreat

1:00 to 6:00 p.m.

Conference Check-In/WRC-NAPGCM Desk

1:30 to 5:00 p.m.

Pre-Conference Intensive: A Therapeutic Approach to Helping Older Adults Who Hoard

(Fee is \$95 if registered by 9/10/10)

Category: Clinical Issues / Audience: All Levels / NACCM Credit: TBD

Compulsive hoarding is a perplexing and confounding problem for afflicted individuals, their families, and care managers. Extreme hoarding behavior can result in significant health and safety hazards. This workshop will discuss the multiple factors that contribute to hoarding behavior and identify five evidence-based therapeutic practices that can improve the lives of afflicted individuals.

Session Objectives: 1. Participants will identify five underlying reasons why people who hoard often resist help. 2. Participants will identify five methods of therapeutic interventions with people who hoard. 3. Participants will identify the importance of risk, capacity, functioning and motivation in determining types of interventions.

Presenter: Mark Odom, LCSW, Consulting, Counseling, Education & Practical Services for Excessive Clutter and Hoarding

Bio: Mark Odom, LCWS, has been working in the aging and mental health field for over 25 years. He is a founding member, former chair, and currently clinical consultant to the Orange County Task Force on Hoarding, a collaborative group of government and community organizations who seek to impact hoarding.

6:00 to 8:00 p.m.

Captains Table: California Cruisin' Welcome Reception

Join friends and associates for a nautical themed evening of networking and fun on a beautiful atrium patio complete with its very own waterfall. Hors-d'oeuvres will be provided. Cash bar.

Friday, October 15th

8:30 a.m. to 4:00 p.m.

Conference Check-In/WRC-NAPGCM Desk

8:30 to 9:15 a.m.

Continental Breakfast & Exhibits

8:30 a.m. to 4:00 p.m.

Exhibit Hall/Silent Auction Open

9:15 to 10:30 a.m.

Opening Session & Keynote Presentation

Chicken Soup Without the Chicken – The Transformative Power of the GCM Relationship

Category: Clinical Issues / Audience: All Levels / NACCM Credit: TBD

Families often come to a GCM in crisis, feeling hopeless about finding solutions. This session will explore the GCM's role as an agent of change, and the use of relationship as a transformative tool to empower families into taking positive actions which might otherwise seem impossible.

Session Objectives: 1. Participants will be able to identify the seven primary roles of the GCM. 2. Participants will learn the concepts of a) filial maturity, b) mutuality, and c) generational maturity, and their effective use in developing positive relationships with families. 3. Participants will be able to describe the GCM's role as a change agent with resistant families.

Presenter: Emily B. Saltz, LICSW, CMC, Director, Elder Resources

Bio: Emily B. Saltz is the founder and Director of Elder Resources, a private practice providing a full range of geriatric care management services for elderly clients and their families since 1992. She received her Masters degree in Social Work from Boston University and is a past president of the New England Chapter of the National Association of Professional Geriatric Care Managers. Prior to developing Elder Resources, Ms. Saltz was a staff consultant to

attorneys and clients at ElderLaw Services. She has written extensively on issues including guardianship, caring for aging parents, and ethical issues in aging. Ms. Saltz has led numerous seminars for social workers, attorneys and consumers, and was a featured speaker on "Hoarding Behavior in Elders" at several national conferences including those of the NAPGCM and the American Society on Aging.

10:30 to 11:00 a.m.

Break/Exhibits

Session #1 Breakouts – 11:00 a.m. to 12:15 p.m.

IA: Blah Blah Blah: How to Make Your Marketing Stand Out, Get Better Results & Be Anything But Boring.

Category: Innovation & GCM Practice Management / Audience: All Levels / NACCM Credit: TBD

No one cares about you or your boring practice! That's how it feels, sometimes, doesn't it? People don't understand what you do or why they need you. "Blah, blah, blah, just tell me how much it's gonna cost and will insurance pay?" Ouch. This session is packed with creative ideas, powerful insights, real world examples and tangible tools you can use right away (and over and over) to create marketing messages, materials and conversations that attract more clients and trigger decisions to hire or refer to you.

Session Objectives: 1. Distinguish their practice in the marketplace and find their points of difference, no matter how much they look like "the other guy." 2. Use the 4 cornerstones of an effective marketing message to create conversations and materials that attract more clients and referrals. 3. Identify and navigate the 4 parts of the marketing and selling process in a way that triggers a decision to hire or refer you.

Presenter: Terri Langhans, CSP, COE, Certified Speaking Professional and Chief of Everything, Blah Blah Blah Etc., Inc.

Bio: Terri Langhans, Certified Speaking Professional, is the author of *The 7 Marketing Mistakes Every Business Makes (And How to Fix Them)* and former CEO of a national healthcare ad agency and marketing firm that specialized in helping health care organizations and independent professionals grow their practice and increase referrals.

IB: The Advantage of Hiring Legally and The Consequences of Hiring Under-The-Table

Category: Legal, Financial & Ethics / Audience: Int/Adv / NACCM Credit: TBD

We will discuss the legal and tax advantages of hiring in-home elder care providers legally. Additionally, the pitfalls of hiring someone "under the table," and the legal, wage and hour, and insurance requirements for hiring a caregiver directly will be covered.

Session Objectives: 1. Learn the numerous benefits of hiring legally, including the substantial tax advantages. 2. Realize that there are significant dangers and expensive consequences to hiring "under the table." 3. Understand the legal, wage and hour, and insurance requirements of hiring a caregiver directly.

Presenters: Robert E. King, Esq., Founder, Legally Nanny; Norman J. Hannay, President, Elder Care Guides

Bio: Bob King, Esq. is the Founder of Legally Nanny, the leading household employment and homecare law firm. Bob is a National Private Duty Association member, and speaks at NPDA and California Association for Health Services at Home conferences. Bob represents homecare agencies and families employing caregivers throughout the United States.

Norman J. Hannay, MPS, CMC is President and Founder of Elder Care Guides, a geriatric care management company in San Diego. He is a Fellow Member of the GCM Leadership Academy and has presented at several Regional and National Conferences on technology and business issues. Mr. Hannay was chair of the NAPGCM National Conference in 1998 and 2002, and Board Member from 1997-2003

IC: Dementia and Driving

Category: Clinical Issues / Audience: All Levels / NACCM Credit: TBD

Giving up driving for the individual with dementia is a matter of when - not if. While we want individuals with dementia to be independent for as long as possible, it is also our duty as medical professionals to identify at-risk drivers and to help them cease driving before an accident occurs.

Session Objectives: 1. Participants will be able to identify five reasons for the need to refer clients to a driving testing program. 2. Participants will identify the three major organizations who provide driving testing. 3. Participants will be able to identify the skills needed for safe driving, and what functional skills are affected by dementia.

Presenter: *Debbie Ricker, Owner, Executive Director, The Adaptive Driving Center*

Bio: *Debbie graduated from Loma Linda University in 1978, and worked in various psychiatric and geriatric settings for 20 years. For the past 12 years she has specialized in working with individuals who have dementia. Debbie is a Certified Dementia Practitioner, and owns a private practice where she provides consultation to dementia care programs, as well as home safety assessments, functional assessments, and driving assessments to individuals. Her goal for individuals being assessed for driving is to keep them driving as long as they can drive safely. Debbie is also dedicated to providing community awareness and education about keeping the brain healthy as one ages, and training for medical professionals regarding all aspects of dementia.*

12:15 to 1:45 p.m.

Lunch & General Session

The Collaborative Approach Between Professional Geriatric Care Managers and Attorneys in Conservatorship Cases

Category: Legal, Financial & Ethics / Audience: All Levels / NACCM Credit: TBD

The concerns facing the elder community, their families and caregivers are all encompassing and include issues pertaining to legal, health care, financial, psychosocial and ethical matters. Since 1997, Mitchell A. Karasov, Esq. has been working collaboratively with geriatric care managers, and has been instrumental in establishing the use of a care plan in California Conservatorship. Mr. Karasov will discuss this collaborative approach and how it can contribute to the quality of life of the elder community.

Session Objectives: 1. Participants will be able to clearly identify what a conservatorship is, and the steps to establishing and maintaining one in California. 2. Participants will be able to clearly identify the role of the geriatric care managers prior to the filing of a conservatorship, and during the legal proceedings, including the care plan. 3. Participants will be able to identify the role of a geriatric care manager in resolving any care issue disputes should they arise.

Presenter: *Mitchell A. Karasov, Esq., Law Offices of Mitchell A. Karasov*

Bio: *Mr. Karasov earned his Bachelors Degree in History from San Diego State University followed by a Juris Doctorate from Golden Gate University School of Law in San Francisco. He served as the Chairman of the Elder Law Section of the Los Angeles Bar Association; is a Past President of the Southern California Council of Elder Law Attorneys, and a Past Chair of the Beverly Hills Bar Association's Probate Section. He is affiliated with many organizations that serve the needs of the elderly; he has presented for many years at the American Society on Aging World Alzheimer's Congress, the Annual Conference of the National Association of Professional Geriatric Care Managers, the Professional Guardians Association and the Professional Fiduciary Association of California; as well as to professionals and seniors throughout California. He has served on the Advisory Board for Leeza's Place. A former instructor on Elder Law issues, he has testified before California Senate and Assembly sub-committees and the Judicial Council on Conservatorship Issues where many of Mr. Karasov's recommendations were codified into the Conservatorship Reform Legislation.*

1:45 to 2:15 p.m.

Refreshment Break/Exhibits & Silent Auction

Session #2 Breakouts – 2:15 to 3:30 p.m.

2A: Incorporating Technology Into Your Care Plan

Category: Innovation / Audience: All Levels / NACCM Credit: TBD

The authors will share the latest trends in technology for aging in place and will show geriatric care managers how they can incorporate the latest trends in technologies in their practices to help clients and their families.

Session Objectives: 1. Participants will learn how technologies can help delay a client's move to a higher level of care. Participants will learn how to utilize and manage multiple technologies in a home setting. 2. Participants will be able to identify at least 10 different technologies which can support their clients to

age in place. 3. Participants will learn the steps involved in assessing a client for technology suitability, evaluating and selecting the most appropriate technology and implementing the technology installation with the care team.

Presenters: Julie Menack, Principal, Fiduciary Care Services; Deborah Newquist, PhD, MSW, CMC, Consulting Gerontologies; Susan Estrada, President, Aldea Communications

Bios: Julie Menack has worked as a care manager and private professional fiduciary since 2006. She is the author of the chapter "Working With Long-Distance Families - Tools the Care Manager Can Use" in the 2008 book **Care Managers and the Aging Family** and the chapter "Technology for Care Management" in the 3rd Edition of the **Handbook of Geriatric Care Management** that is due out in Fall 2010. Additionally, she was the Co-editor, along with Deborah Newquist, of the Spring 2010 Journal of Geriatric Care Management issue, *Useful Technology for Care Managers and Their Clients*, where she also had an article "Using Technology to Support Social and Intellectual Engagement". She has made presentations on technology to NAPGCM, the Professional Fiduciaries Association of California, and Aging Services of California. Her practice is based in Oakland, California.

Dr. Deborah Newquist is the former Director of Geriatric Services for ResCare, Inc., an international human services company based in Louisville, Kentucky. She worked in the areas of geriatric care management, home care, technology supports for persons with disabilities, and caregiving. She was the founder and President/CEO of Senior Care Resources in Newport Beach, California, a pioneering geriatric care management and home care company which she sold to ResCare in 2006. Dr. Newquist received her Ph.D. from UCLA, and has a M.S.W., M.P.A., and Graduate Certificate in Gerontology from the University of Southern California (USC). Dr. Newquist's professional experience includes positions at the Andrus Gerontology Center, USC; Los Angeles County Area Agency on Aging; and Rancho Los Amigos Medical Center. She has been a Center Fellow at the UCLA-USC Long-Term Care Gerontology Center, Co-Editor of *Generations*, a member of the Board of Directors of the Irvine Senior Foundation and of the Alzheimer's Association of Orange County, and a Consultant to the U.S. Senate Select Committee on Aging. Dr. Newquist is past President of the National Association of Professional Geriatric Care Managers (NAPGCM). She is a member of the Board of The Episcopal Home Communities and of the Western Chapter of NAPGCM. She is a member of NAPGCM, NASW, the American Society on Aging, the California Association for Health Services at Home (CAHSAH), and the Gerontological Society of America.

Susan Estrada is the president and CEO of Aldea Communications and an Internet Pioneer. She is the go-to technology strategist for all things broadband and wireless. Named a "thinking nerd" by colleagues, she has a deep interest in emerging broadband and Internet technologies and the ability to make those technologies work to solve real-world problems. Giving practical advice on getting the best Internet service, Susan wrote **Connecting to the Internet**, an O'Reilly Buyer's Guide, in August 1993 (a Barnes and Noble bestseller). Susan has been invited to speak on diverse subjects including education using the Internet, business on the Internet, and connecting to the Internet. The renowned Internet pioneer believes that the exciting new systems and devices streaming on market are the long-awaited helpmates sought by seniors to happily and independently live out their lives in the homes they know and love.

2B: Social Networking: You Can Do This Too!

Category: GCM Practice Management / Audience: All Levels / NACCM Credit: TBD

This session will explain how to use social networking effectively and will help the attendee feel more confident in creating and managing their own social Networking site.

Session Objectives: 1. Participant will be able to identify the purpose of social networking. 2. Participant will be able to set up a social networking account. 3. Participant will be able to post to their social networking accounts.

Presenters: Lisa Moody, JewelCode Corp.; Heather Frenette, RN, MSN, CMC, Partner, Arizona Care Management

Bios: Lisa Moody specializes in helping others to manage their business with technology. Her career has involved working in a computer training and support environment with Mayo Clinic, a graphic design position with IBM, and technology support and regional sales management position with Metafile Information Systems, Inc. She is currently the President of JewelCode Corporation, which is a company specializing in meeting the software and technology needs of independent care managers.

Heather Frenette RN, MSN, CMC is a partner in a care management firm in the Phoenix area. She received her bachelor's degree in nursing from Baylor University, a master's degree in nursing from the University of Texas, and a Certificate in Gerontology from Arizona State University. Ms. Frenette is an active member of the National Association of Professional Geriatric Care Managers and is a frequent speaker on issues related to care management and aging issues. She is also an advocate for the use of technology to streamline one's practice and increase the level of service provided to the clients and family.

2C: Mom Loved You Best and I HATE You For It - GCM's Helping Midlife Siblings Forgive to Forge Lifelong Relationships

Category: Clinical Issues / Audience: All Levels / NACCM Credit: TBD

Sibling conflict from childhood destroys the best GCM care plan. Learn how to move midlife siblings towards forgiveness to end brother and sister squabbles and to help siblings and families work together to care for aging parents.

Session Objectives: 1. The GCM will understand why forgiveness in aging siblings is so important to make a care plan work. 2. The GCM will understand how resolution of a midlife sibling "I Hate You" story can make a midlife sibling happier and healthier. 3. The GCM will understand how forgiveness among midlife siblings can enhance multiple tools to help siblings work together in parent care.

Presenters: *Cathy Jo Cress, Author, New Horizon Press, Jones & Bartlett; Kali Cress Peterson, Program Officer, SCAN Foundation*

Bios: *Ms. Cress is recognized as an expert in geriatric care management. Over the past 30 years, Ms. Cress has given over 100 media interviews on television (including CNN) and radio and in print (including the New York Times, Financial Times, Better Homes and Gardens, Business Week and Southwest Airlines' Spirit magazine). Ms. Cress has spoken at 48 national conferences throughout the United States in the last 25 years and at innumerable regional and local conferences on aging. Ms. Cress is Editor and a contributing author of the first book on geriatric care management, **Handbook of Geriatric Care Management** (Jones and Bartlett, 2000), considered to be the Bible on the subject, which will be published in its Third Edition later this year, and a second, **Care Managers: Working with the Aging Family** (Jones and Bartlett 2008). Ms. Cress lives in Santa Cruz, California, with her husband, Pete Peterson. She is the mother of four children and eight grandchildren. She can be reached at cressgcm@got.net.*

Peterson Bio TBD

3:30 to 4:00 p.m.

Refreshment Break/Exhibits & Silent Auction

Session #3 Breakouts – 4:00 to 5:15 p.m

3A: Not Just Weight: Identifying Nutritional Deficiencies in Aging

Category: Clinical Issues / Audience: All Levels / NACCM Credit: TBD

This session will introduce the importance of nutrition beyond maintaining weight and appetite. If you have ever thought that heartburn or food changing flavors were just signs of aging this is the session you want to attend. We will learn that these and many other symptoms of aging are not "normal" but signs of a treatable nutritional deficiency.

Session Objectives: 1. Participants will be able to understand the concepts of how digestion works, the changes in physiology as one ages and how this affects their nutritional status. 2. Participants will be able to identify at least 5 signs of nutrition deficiencies. 3. Participants will know how to make a plan of action once a nutrition deficiency is detected.

Presenter: *Elizabeth Wagner, Registered Dietician, Certified Clinical Nutritionist*

Bio: *Elizabeth Wagner is a Registered Dietitian and Certified Clinical Nutritionist with 11 years of professional experience. Her specialty is taking the complex science of nutritional biochemistry and applying it simply through individualized nutrition plans. She graduated from Iowa State University with a BS in Nutritional Science and completed her dietetic internship at the VA hospitals in Los Angeles. Elizabeth has been in private practice for 3.5 years.*

3B: Prosecuting Elder Abuse: Demystifying the Criminal Justice System

Category: Legal, Financial & Ethics / Audience: All Levels / NACCM Credit: TBD

Most geriatric professionals know that elder abuse is prosecuted. They see articles and news stories about it, but do not know what to do if they suspect criminal activity. There are many misunderstandings about how cases are presented to the District Attorney's office, what sort of cases are handled by the Elder Abuse unit, and how and by whom these investigations are conducted. The goal of this presentation is to demystify the district attorneys office and make

it a more accessible place for geriatric professionals. With increased knowledge, care managers can more easily identify abuse and share more accurate information with their clients regarding the prosecution of elder abuse cases.

Session Objectives: 1. Participants will understand how to better protect their clients and safeguard their rights. 2. Participants will gain a better understanding of the criminal justice system and the prosecution of elder abuse. 3. TBD

Presenter: Robin Allen, Deputy District Attorney, Los Angeles County District Attorney's Office

Bio: Deputy District Attorney Robin Allen is a highly skilled and experienced trial attorney. She has been a prosecutor since 199 and assigned to the Elder Abuse Section since May 2005. She is a member of the LAC+USC Elder Abuse Forensic Center, the Fiduciary Abuse Specialist Team, the Elder Death Review Team, and the West San Gabriel Valley Elder Abuse Task Force. She teaches classes on elder and dependent adult issues throughout Los Angeles, Orange and San Bernardino counties and in Washington, D.C. at the National Center for Victims of Crime, 2009 national conference. She was featured on the cover of Los Angeles Lawyer magazine in February, 2009 along with an article she authored on elder abuse. She also traveled with the Jewish Federation's Tel Aviv – Los Angeles Partnership's Health and Human Services Committee's delegation to Israel to take part in a delegation dealing with the Social and Legal Responses to Elder Abuse.

3C: In the Trenches: The Rewards and Challenges of Managing an Independent GCM Practice

Category: GCM Practice Management / Audience: Beg/Int / NACCM Credit: TBD

The experiences of the GCM operating as a "sole practitioner" are distinct from those of our colleagues working within larger agencies. Attend this moderated panel presentation, including four experienced GCMs and a professional business coach, to discuss the risks, rewards, and opportunities of working as an independent practitioner.

Session Objectives: 1. Participants will learn strategies to address the major challenges of the independent GCM practitioner. 2. Participants will learn the major factors to be considered in the decision to expand a solo practice to include additional staff. 3. Participants will understand the importance of succession planning for the solo practitioner.

Presenters: Michele Boudinot, MA, CMC, Owner, North Bay Eldercare Options; Lisa Mayfield, LMHC, GMHS, CMC, President, Aging Wisdom, Inc.; La'Keisha Phillips, MS, CMC Chief Operating Officer/Director of Case Management Empower Care, a division of Care Connect; Donna Schilder, PCC, Life & Business Coach, Glacier Point Solutions, Inc.; Jennifer Voorlas, MSG, CMC, President, Geriatric Care Consultants

Bios: Michele has owned and operated North Bay Eldercare Options, north of San Francisco, for five years. She has over twenty-five years experience working with seniors, has a Certificate and Master's degree in Gerontology, is a Credentialed Professional Gerontologist (CPG) and a certified care manager.

Lisa is a solo practitioner in the Seattle area, and has been a member of NAPGCM since 2003. She currently serves as Secretary for the Western Regional Chapter of NAPGCM, is a volunteer support group facilitator with the Alzheimer's Association, and serves as Adjunct Faculty for Antioch University.

With over 10 years of Case Management experience, La'Keisha provides assistance to disabled adults and seniors. She specializes in helping her clients remain at home, independently, as long as possible. She also specializes in assisting clients with a behavioral health diagnosis. When it's time to transition to a lower level of care, she will manage her clients' care within facilities, home setting, and assisted livings through care coordination, monitoring and advocacy.

Donna is a Professional Certified Coach through the International Coaching Federation, holds a Certificate in Coaching & Mentoring from CSULB Extension, and a Professional Designation in Total Quality Management from UCLA. She helps clients plan and implement their business and marketing strategies, improve efficiency, and overcome obstacles to goal achievement.

Jennifer is a certified geriatric care manager, and currently serves as the chair of the Special Features Committee for *Inside GCM*. As an independent practitioner, she does consulting work for several attorneys in the Los Angeles area, as well as care planning for patients within a local neurology practice.

Evening

Free Time and/or Dine Arouds

Saturday, October 16th

8:00 a.m. to 3:00 p.m.

Conference Check-In/WRC-NAPGCM Desk

8:00 to 9:30 a.m.

Breakfast & General Session

Lessons Learned Through Having a More Reflective Practice

Category: GCM Practice Management / Audience: All Levels / NACCM Credit: TBD

Geriatric care managers, like other health professionals are challenged to maintain vibrancy in their professional practice. Healthcare has many risk factors that contribute to burnout and compassion fatigue, yet our patients require attentive, caring, compassionate and competent professionals to meet their needs.

Developing a sustainable strategy to improve professional satisfaction requires a commitment to life-long learning. This presentation will invite participants to consider reflective practice principles as a strategy to enhance career satisfaction and promote professionalism.

Session Objectives: 1. Participants will be invited to consider opportunities to apply lessons learned from their work to their personal experience. 2. Participants will identify several key benefits of developing reflective practice. 3. Participants will explore how embracing vicarious learning can add meaning to their work and home life.

Presenter: Shirley Otis-Green, MSW, ACSW, LCSW, OSW-C, Senior Research Specialist, City of Hope

Bio: Shirley Otis-Green, MSW, ACSW, LCSW, OSW-C is a licensed clinical social worker and Senior Research Specialist in Nursing Research and Education at the City of Hope. Her clinical work, research, presentations and publications focus on transdisciplinary palliative care and integrated symptom management with a special emphasis on underserved populations. Shirley is the Principal Investigator of two National Cancer Institute-funded grants (the ACE Project and ExCEL in Social Work), and developed the nationally recognized Promoting Excellence in Pain Management and Palliative Care for Social Workers course. Shirley received a Social Work Leadership Award from the Project on Death in America and is a Mayday Pain and Society Fellow. In 2009, she was elected as a Distinguished Social Work Practitioner in the National Academies of Practice. Shirley and Terry Attilio, ACSW, are co-editors of the forthcoming *Textbook of Palliative Social Work* published by Oxford University Press. This June, Shirley began a doctoral program in palliative care at Lancaster University in Great Britain.

9:30 a.m. to 2:00 p.m.

Exhibit Hall/Silent Auction Open (note: silent auction closes at 1:50 p.m.)

9:30 to 10:00 a.m.

Break/Exhibits

Session #4 Breakouts – 10:00 to 11:15 a.m.

4A: Empowering Communities Through the “Village” Model

Category: Innovation / Audience: All Levels / NACCM Credit: TBD

This session will introduce the “village” concept and how it can be used to affordably and efficiently allow the older adult population to age in their own homes within their communities. By understanding WISE & Healthy Aging’s WISE Connections model, participants will see how a non-profit social services organization that serves older adults can utilize its existing operational capacity and programs to reduce redundancy and centralize operations for a cost effective approach to provide services to various communities.

Session Objectives: Participants will be able to identify the key characteristics of a community is ready to build a “village” initiative in their community. 2. Participants will be able to identify the rationale of a “hub and spoke” business model in developing a successful “village” initiative. 3. Participants will be able to identify potential partners for a “village” initiative.

Presenters: *Grace Cheng Braun, MSPH, President and CEO, WISE & Healthy Aging; Robin Davidson, PhD, Administrator, City of Santa Monica Human Services Division; Lori Gilder, LCSW, Chair, Mar Vista WISE Connections*

Bios: *As President and CEO, Ms. Cheng Braun leads WISE & Healthy Aging in growth and the development of services for older adults, working to broaden the WISE & Healthy Aging vision and mission. She is also a member of the adjunct faculty at USC's School of Policy, Planning and Development where she teaches business and leadership courses in the USC International Public Policy and Management Program and the Executive Masters in Healthcare Administration Program. Prior to joining WISE & Healthy Aging, Ms. Cheng Braun has held a number of executive-level positions in health care, including a six-year term as Vice President for Marketing and Public Relations at Cedars-Sinai Health System in Los Angeles.*

Ms. Davidson is currently the Human Services Administrator of the Family, Senior and Disabilities Initiatives for the City of Santa Monica. She has comprehensive experience in human services government and nonprofit administration and has management and oversight of up to 120 staff and a \$4 million budget. Her experience also includes policy development, grants management, oversight and development of program evaluation for a broad range of social service and educational programs, and the design, development and implementation of innovative programs and outreach strategies to meet community needs.

Ms. Gilder is currently the chair of Mar Vista WISE Connections and also sits on the Board of Directors for WISE & Healthy Aging. She is a board member of the Westdale Homeowners Association and a member of the Parent Guild at Windward School located in Mar Vista, a suburb in the Los Angeles Westside. She has worked full-time as an LCSW with all ages and also worked at UCLA's neuropsychiatric hospital on the geriatric unit.

4B: (Almost) Everything You Wanted to Know About Special Needs Trusts, But Were Afraid to Ask

Category: Legal, Financial & Ethics / Audience: All Levels / NACCM Credit: TBD

This session will examine the appropriate uses of special needs trust (SNTs) as part of the estate plan for a person with disabilities or other family members planning for their care and how the geriatric care manager can bring added value to the Trustee by virtue of her/his experience and knowledge. A review of the basics of SNTs, including a discussion of the distinction between SNTs created with the beneficiary's own assets and SNTs created for the benefit of the individual with someone else's assets will be done first. Then, more advanced issues including drafting for situations other than public benefits, and how SNTs will work in a changing political and economic climate will be covered.

Session Objectives: 1. Understand the difference between the different types of special needs trusts (SNTs). 2. Learn under what circumstances SNTs can benefit their clients. 3. Acquire tools which will enable geriatric care managers to educate the Trustees of SNTs on how they (the Trustees) can benefit from using their services and expertise.

Presenter: *Stuart D. Zimring, Attorney at Law, Law Offices of Stuart D. Zimring*

Bio: *Stuart D. Zimring is in private practice in North Hollywood, California where he concentrates in the areas of Elder Law, Estate and Life Planning, Special Needs Trust and Probate, Conservatorship and Trust Litigation matters. He is certified as a specialist in Estate Planning, Probate and Trust law by the Board of Certification of the State Bar of California, and is co-Author (together with Donna Bashaw, CELA) of "Tax, Estate & Financial Planning for the Elderly - California Guide" and (together with Prof. Rebecca Morgan and Bradley Frigon) "Fundamentals of Special Needs Trusts", both published by Matthew-Bender. He is also a member of the Matthew-Bender/Lexis-Nexis Elder Law Editorial Board. Mr. Zimring graduated from the UCLA School of Law in 1971 with a J.D. degree and is admitted to practice in California, the U.S. District Court, Central and Northern Districts of California and the U.S. Supreme Court. Mr. Zimring is a Fellow of both the National Academy of Elder Law Attorneys (NAELA) and the American College of Trust and Estate Counselors (ACTEC) and is a Past President of NAELA as well as a Charter Member of CAP, NEELA's Council of Advanced Practitioners. He also serves on the Boards of Directors of a number of non-profit organizations including the National Senior Citizens Law Center (NSCLC) and the Organization for the Needs of the Elderly (ONEgeneration), of which he is also a Past President.*

4C: Empowered Decision Making for Those Without Capacity

Category: Clinical Issues / Audience: All Levels / NACCM Credit: TBD

Discover the framework and tools for guiding families to make better decisions for those who can't speak for themselves. This isn't a one-size-fits-all solution but is a process based on the values of respect and compassion that can be adapted to the level of incapacity and situation.

Session Objectives: 1. Participants will be able to demonstrate the decision making pathway and tools to empower good decision making for those without capacity. 2. Participants will be able to identify when to use each decision-making tool based on the person's level of incapacity. 3. Participants will be able to apply these tools in different situations, including end-of-life decisions.

Presenter: Viki Kind, MA

Bio: Viki Kind, MA is a clinical bioethicist, medical educator and hospice volunteer. Her book, *“The Caregiver’s Path to Compassionate Decision Making: Making Choices for Those Who Can’t,”* guides families and aging professionals through the difficult process of making decisions for those without capacity. Viki’s blog is KindEthics.com.

11:15 to 11:45 a.m.

Refreshment Break/Exhibits

11:45 a.m. to 1:15 p.m.

Lunch/Chapter Business Meeting (open to all)

1:15 to 2:00 p.m.

Dessert/Exhibits/Prize Drawings/Silent Auction Closing (at 1:50 p.m.)

2:00 to 3:00 p.m.

General Session

The Growing Shortage of Geriatric Specialists

Category: Innovation / Audience: All Levels / NACCM Credit: TBD

Why is there a lack of geriatricians as the need for elder care continues to increase as our society ages? Learn why and what can be done to address this significant gap in our health care system.

Session Objectives: 1. Participants will understand how the field of geriatrics differs from other primary care disciplines. 2. Participants will understand the barriers to pursuing a career in geriatrics. 3. Participants will understand how the shortage of geriatricians will impact the future of elder care in the U.S.

Presenter: Sonia Sehgal, Associate Professor, University of California, Irvine

Bio: Sonia Sehgal, M.D. is an associate professor of medicine at the University of California, Irvine where she completed her fellowship in Geriatrics.

Late Afternoon/Evening

Free Time & Optional Activity

7:30 p.m.

South Pacific at the Orange County Performing Arts Center (an optional event; \$48 fee)

We are securing a block of tickets to Rodgers & Hammerstein’s “South Pacific” at the Orange County Performing Arts Center for Saturday night, October 16th. Tickets will be \$48 per person. The Center is just across the street from the hotel. If you are interested in securing a ticket, select this option when you register online.

A stunning reinvention produced by Lincoln Center Theater, South Pacific swept the 2008 Tony Awards®️, winning seven honors including Best Musical Revival. The breathtaking new production features a cast of 34 and a full orchestra of 26 members – the largest orchestra of any touring Broadway production. Set on a tropical island during World War II, the musical tells the sweeping romantic story of two couples and how their happiness is threatened by the realities of war and by their own prejudices. The beloved score's songs include "Some Enchanted Evening," "I'm Gonna Wash That Man Right Outa My Hair," "This Nearly Was Mine" and "There is Nothin' Like a Dame." USA Today cheers, "Gorgeous! South Pacific doesn't just float; it soars!"

Those interested in meeting up with a group for dinner before the musical (at approximately 5:30 p.m.) will be provided information on where to meet and local restaurant lists on-site.

Sunday, October 17th

8:00 a.m. to 12:00 p.m.

Conference Check-In/WRC-NAPGCM Desk

8:00 to 8:30 a.m.

Continental Breakfast

Session #5 Breakouts – 8:30 to 9:45 a.m.

5A: Relocation Stress Syndrome in the Elderly: Prevention & Treatment of Transfer Trauma

Category: Clinical Issues / Audience: All Levels / NACCM Credit: TBD

The purpose of this session is to help professionals who work with seniors learn to identify and minimize the risks associated with senior relocation and care transitions, to address problems in a clinical context, to intervene effectively, and to work with families and facilities to achieve positive outcomes for seniors.

Session Objectives: 1. Examine the moving process through the lens of Relocation Stress Syndrome and utilize current resources and skills in a new way. 2. Identify risk factors for Relocation Stress Syndrome and take immediate steps to minimize the risk. 3. Identify symptoms of Relocation Stress Syndrome and implement specific interventions.

Presenter: Tracy Greene Mintz, LCSW, Principal, Senior Care Training

Bio: Tracy Greene Mintz, LCSW and Long-Term Care Consultant, teaches this topic across the U.S. to case managers, administrators, nurses, social workers, and other disciplines that serve elderly clients. She's worked with seniors at all levels of care. She also holds a Gerontology Certificate and master's degree in film and television.

5B: Fraud, Undue Influence and Mental Status in Elder Abuse - What the Psychologist Looks For

Category: Clinical Issues / Audience: Int/Adv / NACCM Credit: TBD

Psychologists and Geriatric Care Managers make a great team - especially when uncovering financial elder abuse. Learn how in-home evaluations assist in identifying and/or preventing financial elder abuse related to various cognitive impairments.

Session Objectives: 1. Participants will review areas of financial elder abuse as a subject of elder abuse and neglect. 2. Participants will identify the cognitive deficits associated with vulnerability to abuse. 3. Participants will be introduced to psychological assessment tools for evaluating cognitive functioning (clock drawing, verbal fluency test, etc.)

Presenter: Gary Freedman-Harvey, Ph.D., Licensed Psychologist, Geriatric Forensics

Bio: Dr. Gary Freedman-Harvey is a licensed psychologist with a focus on geriatric forensics and the psycholegal issues of aging. He works with geriatric care managers, conservators and attorneys. He provides in-home evaluations related to mental capacity, decision-making, estate planning, conservatorships, elder abuse and undue influence.

5C: Adding To or Expanding Your GCM Practice: 7 Critical Steps to Grow Your Practice

Category: GCM Practice Management / Audience: All Levels / NACCM Credit: TBD

Hoping to hire another care manager soon? Or adding care management to your existing home care or eldercare organization? This session will address the key skills you will need to expand successfully. Success depends on issues you've heard about-sizing the market, financial planning for your business, minimizing non-billable time, cash flow management, productivity, and smart hiring-but you probably don't have the inside track on how to manage them for

your well-being and success. This session will provide practical knowledge, templates, and best practices that will be immediately relevant for your own productivity and revenue growth. Based on the years of experience of building and managing care management startups and large organizations, Jack Herndon, MBA and Cathy Cress, MSW will share with you the skills and case studies that will provide a straightforward framework to managing your practice.

Session Objectives: 1. Participants will understand the criteria to decide when (and whether) to add or expand their care management practice. 2. Participants will understand how to quantify the market opportunity for their new or expanded practice. 3. Participants will understand how to build a simple financial plan including estimated income and expenses. 4. Participants will learn how to create a budget of billable activities for each client, enabling a GCM to provide a client breakdown of anticipated fees. 5. Participants will identify 5 ways to capture more billable activity. 6. Participants will apply cash flow management to their own practice, ensuring ability to cover expenses and not run out of cash.

Presenters: Jack Herndon, Managing Partner, Sage Eldercare Solutions and Cathy Cress, Principal, Cresscare

Bios: Jack Herndon, MBA, has over 20 years of experience in marketing, management and business development roles in companies ranging from Fortune 1000 organizations to start up organizations (for profit and not-for-profit). He has co-founded two companies and has raised more than \$22 million in venture capital funding. He and his wife Nina run Sage Eldercare Solutions www.SageEldercare.com, a unique geriatric care management practice focused on quality of care and quality of life. Sage Eldercare's staff includes a multidisciplinary team of nurses, social workers and gerontologists. In addition, Jack currently teaches care managers through the University of Florida certificate program (Ethical, Legal and Business Aspects of GCM) and is co-author of the forthcoming chapter in the Geriatric Care Manager Handbook "Adding GCM to a Home Care Agency". He is a founding board member and former Treasurer of the San Francisco Village www.SFVillage.org. He recently published *The Hospital Discharge Organizer* and has led numerous workshops for families and professionals (elderlaw attorneys, fiduciaries, etc.) navigating the eldercare maze. Mr. Herndon earned his B.A. from Brown University and his MBA from Stanford University.

Ms. Cress is a recognized as an expert in geriatric care management. Over the past 30 years, Ms. Cress has given over 100 media interviews on television (including CNN) and radio and in print (including the New York Times, Financial Times, Better Homes and Gardens, Business Week and Southwest Airlines' Spirit magazine). Ms. Cress has spoken at 48 national conferences throughout the United States in the last 25 years and at innumerable regional and local conferences on aging. Ms. Cress is Editor and a contribution author of the first book on geriatric care management, *Handbook of Geriatric Care Management* (Jones and Bartlett, 2000), considered to be the Bible on the subject, which will be published in its Third Edition later this year, and a second, *Care Managers: Working with the Aging Family* (Jones and Bartlett 2008). Ms. Cress lives in Santa Cruz, California, with her husband, Pete Peterson. She is the mother of four children and eight grandchildren. She can be reached at cressgcm@got.net.

9:45 to 10:00 a.m.

Refreshment Break

10:00 to 11:30 a.m.

Closing Session

Purposeful Aging: Been There, Done That, Doing It Better!

Category: Clinical Issues / Audience: All Levels / NACCM Credit: TBD

Natasha Josefowitz has been there ... the plains of Africa and the jungles of Borneo. She's done that ... met world leaders, been a professor and columnist, wife, and mother. And now with eyeglasses perched on her nose and hearing aid tucked away somewhere in a drawer, she's doing it all better. Lift your spirits and share in her personal mission to embrace the aging process and learn the value of growing old in community.

Session Objectives: 1. Participants will learn directly from an "end user" of geriatric care services the importance of purpose and community in an older person's life. 2. Participants will learn the value of humor as a tool for healing, both physically and mentally. 3. Participants will learn tools for empowering elders to embrace the aging process.

Presenter: Natasha Josefowitz, Ph.D.

Bio: Dr. Natasha Josefowitz was a professor of management for thirty years and hosted her own public radio program for ten years. She is an internationally known keynote speaker, an award-winning poet and the best-selling author of eighteen books. *The Washington Post* says: "Natasha Josefowitz is helping her generation, and those that follow, find their way into a successful, meaningful and fun older age...her optimism about aging is inspiring."