



Leading Together

CREATE  
*Innovate*  
INSPIRE



Home Care  
Association of America

2016  
Annual  
Leadership  
Conference

September 25-28 • Hilton Anaheim Hotel  
Anaheim California



# Welcome

## Leading Together: Create, Innovate, Inspire

As the premier association representing the home care industry, the Home Care Association of America (HCAOA), is committed to connecting and educating our members. We stay on top of the latest issues, have our finger on the pulse of future trends and keep our member companies informed. Whether providing training on the latest business strategies, technology or hosting our dynamic annual leadership conference, HCAOA enables our members to grow, advance workers' skills and meet the needs of America's seniors.

The 2016 HCAOA Annual Leadership Conference will take place in Anaheim, California September 25-28. The HCAOA is encouraging home care providers to attend the conference this year with the theme **Leading Together: Create, Innovate, Inspire**. Attendees will be immersed in the latest home care innovations, business strategies, practices and methods throughout the conference. They will also have the opportunity to learn from industry leaders in keynote speeches and expert breakout sessions on a range of must-see topics including:

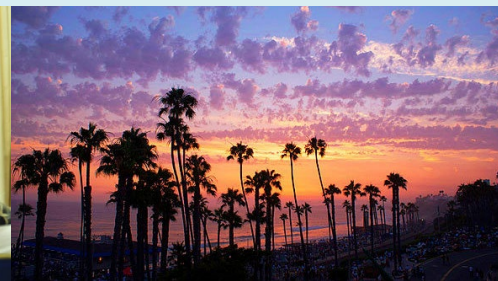
- Sales/Marketing
- Operations
- Technology
- Innovations

Throughout the conference, leading vendors will be exhibiting their latest offerings supporting home care providers across the country. Take this great opportunity to learn the newest competitive strategies, find out what's cutting-edge, and network with key innovators across the home care industry all in one location.

## Hotel Information

The 2016 Annual Leadership Conference will be held at the Hilton Anaheim Hotel in Anaheim, CA. Located in the heart of Southern California and known for its ideal, year-round climate, Orange County is filled with a myriad of activities. Here, you'll find world-famous theme parks, distinguished shopping districts, championship golf courses, professional sports teams and trendy beach towns.

HCAOA has secured an outstanding rate of \$226 plus tax per night from the Hilton Anaheim Hotel. Reservations can be made by calling 877-776-4932 or click [HERE](#). Please book accommodations by **September 2, 2016** and mention that you are an attendee of the HCAOA Annual Leadership Conference to ensure you receive our discounted rate.



HCAOA members serve  
**nearly 400,000 seniors**  
and people with disabilities.



HCAOA members employ  
**more than 500,000 caregivers.**



HCAOA caregivers provide  
**nearly 1 million hours**  
of care per day.



HCAOA members pay  
**more than \$4.8 billion**  
in payroll to employees.



2014 Data



*Join the exclusive voice of the  
home care industry*

The Home Care Association of America (HCAOA) represents over 2,500 companies, and sets the standard for providing high quality home care.

HCAOA represents the industry's interests in Washington, DC and in state capitals across the United States, promotes the value of home care while advancing the industry, and connects and educates its members. HCAOA stays on top of the issues and keeps its members informed - whether providing training on the latest business strategies or technology or hosting its dynamic annual leadership conference on today's cutting-edge issues. HCAOA enables home care companies to grow, advance caregiver skills and meet the needs of America's seniors. **JOIN TODAY!**

### HCAOA Member benefits include:

- **Discounted rates for HCAOA Annual Leadership Conference**
- Access to printable public awareness materials for consumers and policymakers
- Access to the *Caring for America's Seniors: Value of Home Care* report, the first report of its kind defining home care and its importance, backed by data from trusted sources
- Information and resources via timely newsletters
- Access to critical legislative/regulatory information
- Company's listing on the HCAOA home care provider locator service
- Education discounts for entire staff for HCAOA hosted educational offering/webinars
- Access to special home care provider features on the association website
- Purchasing discount program
- Access to local chapters, where applicable
- Eligible to vote and volunteer for a leadership role in HCAOA to help set the direction and focus of the association
- Membership certificate and window decal recognizing HCAOA membership
- Use of the HCAOA logo for company's marketing materials

**Visit [www.hcaoa.org](http://www.hcaoa.org) to join the HCAOA today!**

# The Time Is Now!

## JOHN O'LEARY

### National Best Selling Author

Expected to die, John O'Leary now teaches others how to truly live. In 1987, John O'Leary was a curious nine-year-old boy. Playing with fire and gasoline, John created a massive explosion in his home and was burned on 100% of his body. He was given one percent chance to live. He has since survived and thrived - as a college graduate, business owner, author, husband and father. John is proof of the power of the human spirit.

As an internationally acclaimed speaker, John shares his message with an average of 50,000 people at more than 120 live events each year. With emotional storytelling and great humor, John reminds audiences of the significance of daily attitudes, the power of personal choices and the profound impact of our actions. He reawakens each audience member to realize the gift of today and the possibility of tomorrow.



## ON FIRE: The 7 Choices to Ignite a Radically Inspired Life

We live in a world where “accidental living” - mindlessly moving through routines, wasting countless hours on social media, or complaining about what’s wrong in our jobs, families and society - has become the norm. But John O'Leary reminds us that just because we got out of bed this morning does not mean that we are truly living.

What would our day, impact and output look like if we lived a radically inspired life every single day?

Living radically inspired means you learn from past mistakes, rise above challenges and thrive no matter the circumstances. No one embodies this more than powerhouse inspirational speaker John O'Leary - who was nearly killed in a devastating fire at age nine. Today, John inspires 50,000+ people each year around the world. In his #1 national best-selling book *ON FIRE: The 7 Choices to Ignite a Radically Inspired Life*, John has identified choices to transform your life and business.

John shares the critical truth that “inflection points” - moments in time that change everything that follows - occur daily. Realize it’s your choice how these inflection points will affect you. Your life has much less to do with what happens to you, and much more to do with how you react to it. Are you ready to live on fire?

### KEY LEARNING OBJECTIVES

#### ACCOUNTABILITY:

The home care industry has achieved significant growth and progress despite changing regulations and misconceptions in recent years. As a home care industry, we need to own our wins and our failures to truly celebrate our outcomes. John will help you discover the power of taking ownership of your lives and careers, and realize the impact it will have not only on the lives of those you serve, but also on your bottom line. Replace blame shifting with courageous living.

#### VICTOR MINDSET:

Too few clients, not enough caregivers, and not enough hours in the day...these are all things we within the home care industry can relate to. Instead, let’s shift our perspective to leverage our strengths and reclaim our lives. First, John will help you see how perspective is coloring each of your interactions. Then, he’ll guide you as you shift your perspective to strive for progress (not perfection) and learn from defeat. With a new common mindset, you’ll achieve unbridled success.



# General Session Speakers



Erik Madsen

## ERIK MADSEN

COO, Home Care Pulse

### Innovative Strategies That Inspire Client-Driven Growth

Clients are the lifeblood of home care. They are the deciding factor between the companies that thrive and those that die. Clients hold the impressive power to drive or hinder a company's progress, and wise providers are channeling this power by strategizing for client-driven growth.

Join Erik Madsen to discuss key methods for generating growth, decreasing client acquisition costs, and increasing client lifetime values through a client-driven growth strategy. Discuss techniques for turning clients into promoters, and discover how to convert promoters into your #1 referral source.



Patrick Cooney

## PATRICK COONEY

President, The Federal Group, Inc.

### Panelists:

**BOB KING** Attorney & Founder, Legally Nanny

**ELIZABETH MURPHY** Attorney, Manning & Kass

**EILEEN MAGUIRE** Attorney, Gilliland, Maguire & Harper, P.C.



Bob King

### HCAOA 2016 Public Policy Update & Exploring the Latest Home Care-Related Legal Issues

During the first portion of this session, Patrick Cooney, HCAOA's Federal Legislative Consultant, will review HCAOA's 2016 progress on key issues facing the home care industry at both the state and federal levels. Attendees will learn how to become active advocates in their own state, and how to build relationships with policy makers.



Elizabeth Murphy

Following his public policy update, Mr. Cooney will be joined by attorneys Bob King, Elizabeth Murphy and Eileen Maguire to offer participants an informative Q&A session where they will address the latest legal issues and topics related to the implementation of policies and laws impacting the home care industry at the local, state and federal levels. Mr. Cooney will serve as moderator, as the team of attorneys highlight for attendees the various changes taking place in 2016 (and beyond).



Eileen Maguire

Topics will include: changes to federal overtime rules; the companionship exemption and how to structure your home care business legally and effectively in response to these changes; sleep time; travel time; responding to Department of Labor audits; and, wage and hour issues affecting your company. Attendees are encouraged to submit questions in advance to maximize audience participation.



Laurie Orlov

## LAURIE ORLOV

Founder, Aging in Place Technology Watch

### Technology In The Home: What's New and What's Next?

Technology in the home for older adults, caregiving professionals and families can enable safety, engagement, and communication. Caregiving matters in 2016. Policy changes are in the works that help the circle of care for family caregivers, care recipients, and care-related services. At the same time, the professional caregiving market, including tech-enabled home care, is booming and has become a new favorite of investors. The result; older adults stay in their own homes longer and more safely, aging successfully. This session reviews technology and new offerings that make caregiving work.

# Breakout Session Speakers



Merrily Orsini

## MERRILY ORSINI

President/CEO, corecubed

### The Why Factor: How to Stand Out in the Home Care Market

Home care market maturation with increased competition calls for innovation in reaching the target audiences. In this session, home care providers will learn to be more strategic about going to market. The concept of “less is more” applies in the micro-marketing moments in order to be heard above the noise.



Doug Pace

## DOUG PACE

Director, Alzheimer's & Dementia Care, Alzheimers Association

### Dementia Care Research & Practice - What's New & On the Horizon?

There are an estimated 5.4 million Americans living with Alzheimer's disease according to the Alzheimer's Association's 2016 *Alzheimer's Disease Facts and Figures* report. This number is expected to triple by mid-century especially as the baby boomer generation continues to age. This session will discuss current research initiatives of the Alzheimer's Association as well as provide crucial information to those dedicated to providing care in the home.



Derek Jones

## DEREK JONES

VP Marketing, ClearCare Online

### Using The Harvard Medical School In-Home Program & Five Simple Steps To Double Your Profits Within 6 Months

Tech entrants and payment models moving to value-based care have changed the game. First, hear updates from the Harvard Medical School In-Home program – the only large scale study to prove the impact of home care. Then, see the curtain pulled back on how small changes in your pricing, tax credits, lowering your workers' compensation rates, and adding funding for veteran clients can propel your agency to the next level.



Gail Haskett

## GAIL HASKETT

Business Consultant /Gerontologist, Aging Resources, Inc.

### Adaptive Marketing: Defining and Marketing Your Unique Niche

This session will help you identify and define your unique niche through establishing a geographical market and performing competitive analysis, identifying your agencies strengths and weaknesses, and learning how to “adapt” your marketing approach to each type of referral source.



# Breakout Session Speakers



## **BOB ROTH, BS**

Managing Partner, Cypress HomeCare Solutions

Bob Roth

## **JOHN MARCHICA**

CEO, Darwin Health



John Marchica

### **Disruptive Transformation and the Accountable Care Organization (ACO)**

Although Accountable Care Organizations (ACOs), have represented the fastest-growing segment of the health care industry over the last several years, home care, home health and hospice executives report a general lack of familiarity and experience with ACOs. As a result, few partnerships have been explored. In this session, we will discuss real-world examples of how collaborating with an ACO can lead to better patient care—and to a better bottom line. We will address the current state of accountable care, perspectives from ACO leadership, the future of ACOs and home care, home health care and hospice. Attendees will leave with an understanding of how to create a powerful value proposition that leads to enduring partnerships with ACOs.



Beth Scholer

## **BETH SCHOLER, CC, CDM, CFPP**

CEO, Caregivers Kitchen

## **DORIAN MAPLES, RN, BA, CMC.**

Founder/Owner Home Nursing Services, Angel Corps, Dorian Maples & Associates



Dorian Maples

### **The 7th Vital Sign: Using Nutrition for Niche Marketing**

All home care companies promote their caregivers' compassion and exceptional client care, but what about their kitchen skills? Learn how culinary training for your caregivers benefit your clients and staff and can give your company a marketing advantage. This presentation will give you insights on how to implement culinary and nutrition training for your staff.



Jason Svatek

## **JASON SVATEK**

Senior Vice President, Pipeline Success Inc. & CareInHomes

### **Through The Eyes of The Careseeker**

The first step a family takes into the spectrum of senior care and the decisions they must make are unfamiliar. The job of the home care provider is to assist them in crafting a reliable, cost-effective solution for in-home care. But where are the crucial decision makers coming from, and what is their expectation? CareInHomes, the largest provider of digital inquiries to aggregators, shares their profiling data on the consumer's own assessment and suggests how to adapt these insights for better care management and better customer relations.





# Breakout Session Speakers



Scott Osborne

## SCOTT OSBORNE

Managing Principal, Osborne HomeCare Group, LLC

### How to Combat the “Uberization” of the Home Care Industry

Emerging “disruptors” are gearing up to transform the home care industry the way Uber has transformed the taxi cab industry. This session will focus on their progress and how home care operators can defend their value and turf.



Joe DeMarkey

### Panelists:

**JOE DEMARKEY** Strategic Business Development Leader, Reverse Mortgage Funding LLC

**KYLE LARAMIE** President, Veterans Care Coordination

**CRAIG STACK** Managing Director, Life Credit Company

### The Price of Living Longer: Exploring Home Care Issues Related to Financing Costs and Insurance Options

It’s no secret that living longer comes at a higher cost today. During this unique, educational session, attendees will learn about the wide range of financing, insurance and long-term care options available to help those caring for a loved one at home.



Kyle Laramie

Joe DeMarkey, Strategic Business Development Leader, Reverse Mortgage Funding LLC, will share important details about how a reverse mortgage can be a viable loan option to help homeowners, ages 62 and older, receive the care and services they need while they continue living in their own home.

Next, Kyle Laramie, President, Veterans Care Coordination, will present valuable information about how families caring for veterans can qualify to receive federal benefits from the government for direct care services. Services include financial assistance, meal preparation, laundry, supervision and companionship and more, to help those who wish to remain independent at home.



Craig Stack

Craig Stack, Managing Director, Life Credit Company, will reveal important details about how individuals can monetize their life insurance coverage to help pay for the cost of home care, especially for those seniors with a life-limiting illness that have any type of existing life insurance coverage.





# Breakout Session Speakers



Steven Fox

## STEVEN FOX, D.O.

Medical Director, Wellspring Personal Care

### Value Based Care Initiatives - New Revenue Opportunities for Private Duty Home Care: Measurable Outcomes, Quality Improvement, Care Coordination

Since the enactment of the Affordable Care Act in 2010, there has been unprecedented change and consolidation in American health care. By 2018 it is projected that over 80% of all health care payments will be tied to value and outcome. There will be an expectation that all providers demonstrate conscientious use of best evidence as they provide care for chronically ill patients living in the community. This will undoubtedly raise the bar for private duty home care organizations that partner with hospitals, long-term care facilities, accountable care organizations (ACOs), insurance payers, and physician practices. The session will enable home care organizations to become credible and preferred providers who will be able to work collaboratively in the new models of evidence-based care.



Stephen Tweed

## STEPHEN TWEED

CEO, Leading Home Care

### DNA of A CEO: The Top Ten Competencies of Top Tier Home Care Leaders

What does it take to make a great CEO in the home care business? How would you describe the leadership style of the leading CEOs? What motivates them? What are the important competencies of the Top Tier CEOs? The answer to these questions is found in the results of the 2016 Home Health Care CEO Leadership Study. This study, launched by Leading Home Care, a Tweed Jeffries company and supported by several state and national home care associations, has surveyed CEOs of top tier home health agencies and private pay home care companies. The survey identified the leadership styles, workplace motivators, and core competencies of these high performance leaders. Now, the outcomes of this study are available to you in the form of a keynote speech by Stephen Tweed. Using facts and data from the study, examples of specific industry leading CEOs, and illustrations for dozens of interviews, Stephen will paint a picture of the behavior, motivators, and competencies of our industries top performing executives. For the first time ever, you'll hear strategic insights into what it takes to be successful as a chief executive in home health care, hospice, and private duty home care.



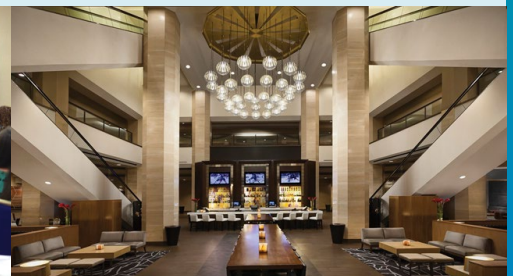
Danny Thompson

## DANNY THOMPSON

Professional Geriatric Care Manager and Comfort Keepers Franchise Owner

### Increasing Margins by Expanding Your Business in Residential Care Settings

Our current business model is one caregiver to one client in one location at one time. This is a costly endeavor to both business owner and client. By capitalizing on an emerging trend in senior care, Mr. Thompson will show providers how you can operate more efficiently and with greater profit margins by incorporating residential care homes in our mix of service.



# Breakout Session Speakers



Georjean Sweis

## GEORJEAN SWEIS

Director of Operations, Visiting Angels/Living Assistance Services

### **Paving Your Road to Success with Recruitment & Retention**

Finding qualified caregivers and retaining them within your organization has become a major concern and initiative of home care providers. The primary focus is to offer viable options and solutions to consider in developing or enhancing recruitment to attract, hire and retain qualified caregivers and addressing the challenges of low caregiver supply as well as meeting the ever-increasing demands for client care needs without breaking the bank (minimal turnover and associated costs). This discussion will cover the recruitment process flow, sources, selection tools and strategies to improve outcomes as well as creating operational measurements to track and monitor effectiveness and accountability of recruitment/retention efforts.



Alison Grimes

## ALISON GRIMES, AUD

Director of Audiology, UCLA Health

### **Best Practices Within the Home Care Industry: Hearing and Balance**

Managing clients with hearing and balance issues especially those with a risk of falling can be challenging. In this session, we will provide an overview of hearing and balance issues that occur in older individuals and we will discuss how you and your staff can identify hearing and balance problems your clients may be experiencing. Further, we will describe solutions and strategies that cost little or nothing to help improve your clients hearing and balance function.



Shaista Kazmi

## SHAISTA KAZMI

President and Founder, APNA GHAR LLC

### **The Unique Challenges Facing the Elderly Ethnic Minorities in the United States**

What are unique challenges facing the elderly ethnic minorities in the United States? What challenges do caregivers face when caring for those from other cultures and those who have different religious backgrounds? Attendees will learn how can we allocate resources for the elderly minority population in a system that is already heavily burdened. Attendees will also learn how we can bridge the gap on access to affordable health care and senior care in this minority group.



Ryan McEniff

## RYAN MCENIFF

Owner/CEO, Minute Women Home Care

### **Internet Marketing Secrets for Private Home Care Agencies**

Opportunities exist in skilled nursing facilities, assisted living facilities and other senior care settings to develop relationships and obtain referrals. In this session, participants will learn about the advantages of online marketing over traditional marketing. This session will provide attendees with multiple strategies to start getting leads and phone calls from customers discovering your business online.

## Technology Showcase

**NEW IN 2016!**

HCAOA will be hosting the first ever Technology Showcase! The Technology Showcase will include a general session followed by breakouts that inform attendees about the latest home care innovations. The General Session will educate attendees on how the professional care-giving market and tech-enabled home care are working together to allow the aging population to age in place at home. The breakouts will allow attendees to view a variety home care innovations from various companies. Don't miss this unique opportunity to learn about the latest innovations in the home care industry!



# 2016 Schedule

## SUNDAY, SEPTEMBER 25

5:30pm - 7:30pm HCAOA Opening Night Reception in Exhibit Hall

## MONDAY, SEPTEMBER 26

8:00am - 9:00am Breakfast (Exhibit Hall)  
9:00am - 10:30am Welcome & Keynote Address  
**ON FIRE: The 7 Choices to Ignite a Radically Inspired Life**  
John O'Leary, National Best Selling Author  
10:30am - 10:45am AM Break (Exhibit Hall)  
10:45am - 12:15pm Breakout Sessions  
12:15pm - 1:45pm Lunch  
1:45pm - 3:15pm Breakout Sessions  
3:15pm - 3:30pm PM Break (Exhibit Hall)  
3:30pm - 5:00pm Breakout Sessions

## TUESDAY, SEPTEMBER 27

8:00am - 9:00am Breakfast (Exhibit Hall)  
9:00am - 10:30am General Session: **Innovative Strategies That Inspire Client-Driven Growth**  
Erik Madsen COO, Home Care Pulse  
10:30am - 11:00am Beverage Break (Exhibit Hall)  
11:00am - 12:30pm Breakout Sessions  
12:30pm - 2:45pm HCAOA Business Meeting & Luncheon  
2:45pm - 3:15pm Beverage Break (Exhibit Hall)  
3:30pm - 5:00pm General Session: **HCAOA 2016 Public Policy Update & Exploring the Latest Home Care-Related Legal Issues**  
Pat Cooney President, The Federal Group, Inc.

## WEDNESDAY, SEPTEMBER 28

8:00am - 8:30am Breakfast  
8:30am - 10:00am Technology Showcase General Session: **Technology In The Home: What's New and What's Next? NEW IN 2016!**  
Laurie Orlov Founder, Aging in Place Technology Watch  
10:00am - 10:15am Beverage Break  
10:15am - 11:45am HCAOA Technology Showcase Breakouts **NEW IN 2016!**  
11:45am - 12:30pm Closing Comments - Grab & Go Lunch

### CONFERENCE REGISTRATION

Until Aug. 1st • \$950 Member - \$1,350 Non-Member • After Aug. 1st • \$1,050 Member - \$1,450 Non-Member

**You can register today online by going to [www.hcaoa.org](http://www.hcaoa.org).**

Call 877-776-4932 to make hotel reservations. Mention HCAOA Conference for special \$226 per night guest room rate.



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