

forward

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Director of Visionary Thinking?
Chief Collaboration Officer?
Join us as we imagine the new
landscape of serving older adults.

LeadingAge
Georgia

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Georgia
Institute on Aging

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South Carolina

S.C. Institute
on Aging

2021

2021 LeadingAge Georgia | South Carolina Joint Annual Conference & Trade Show

Hilton Head Marriott Resort & Spa
Hilton Head, South Carolina
September 20-22, 2021

Dear Colleagues and Friends,

For over a year now, you've risen to every challenge the pandemic brought and you've given so much of yourself to take care of older adults and your team. Now, we encourage you to come together with your LeadingAge colleagues and friends to renew, recharge and move *Forward*.

The LeadingAge Georgia/South Carolina conference will feature Francis Battisti, PhD who will take us on a journey of taking the best from our past and listening, reflecting and reclaiming so that we can create the next chapter of our lives.

We'll discuss the lessons we learned during the pandemic and the challenges we face as we move *Forward*. We've built in time for you to share ideas and collectively identify issues that need attention as we advance our mission.

Expect great educational sessions with outstanding speakers and timely topics!

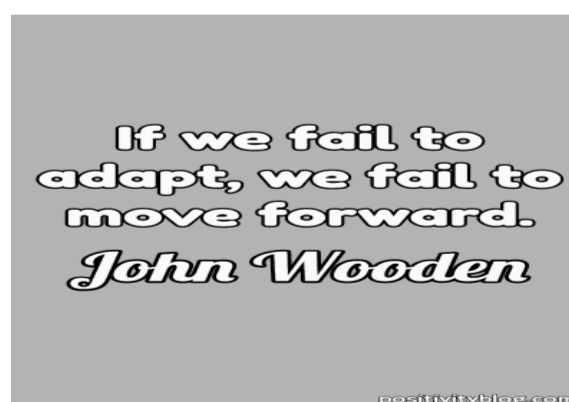
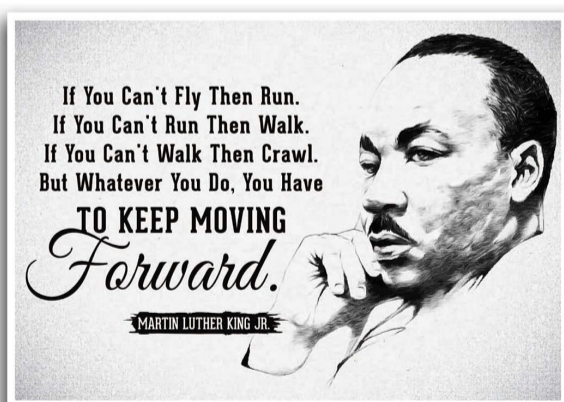
There will be time to reenergize on the beach, time for celebrating efforts over the past year and opportunities to be inspired with a shared sense of purpose as we move *Forward*.

Johann Wolfgang Von Goethe said "we must always change, renew, rejuvenate ourselves; otherwise we harden." Join us on Hilton Head Island and together we'll emerge renewed and prepared for moving *Forward*.

Take care everyone,

Gwen Hardy, Chair LeadingAge Georgia
Chief Operating Officer
Presbyterian Homes of Georgia

Bob Benson, Chair LeadingAge South Carolina
Executive Director
Rolling Green Village



Program-at-a-Glance

Monday, September 20

10:00-5:00	Registration
12:00-2:00	Opening General Session/ Keynote
2:00-5:00	Exhibitor Registration & Setup
2:30-3:30	Breakout Sessions
4:00-5:00	Breakout Sessions
5:15	Opening Reception
6:45	Dinner on your own

Tuesday, September 21

7:30-9:00	Exhibitor Registration & Setup
8:00	Continental Breakfast
8:30-9:30	Breakout Sessions
9:15	Briefing with Exhibitors & Sponsors
9:30-12:30	Tradeshow Open
12:00	Door Prize Drawing by Exhibitors
12:00-1:00	Tradeshow— Networking Luncheon
1:00-2:00	Breakout Sessions
1:15	Exhibitor Breakdown
2:30-3:30	Breakout Sessions
4:00-5:00	Breakout Sessions

Wednesday, September 22

8:00	Continental Breakfast
8:30-9:30	Breakout Sessions
10:00-11:00	Breakout Sessions
11:30-12:30	Closing General Session/ Keynote

Opening/Closing Keynote Speaker

Dr. Francis Battisti



Noted educator, speaker, consultant, and author, Dr. Francis L. Battisti, offers individuals and organizations a pathway to explore their potential and move toward desired transformation. His national reputation in the fields of motivation, health enhancement, organizational development, and conflict disposition is manifest in his work with numerous corporations, major health-care organizations, and congressional and other government committees. His workshops and consulting endeavors have been offered throughout the United States, Europe, Canada and the Caribbean.

Dr. Battisti is the former Executive Vice President and Chief Academic Officer at SUNY Broome Community College, where he was admitted to The State University of New York Distinguished Professorship for Service Academy and also a Recipient of the State University of New York Chancellor's Award for Excellence in Teaching. He has also been recognized by "The Morning Knights Toastmasters Award" for Excellence in Communication and Leadership. The Alzheimer's Association Central New York Chapter as the honoree of the "Memory Makers Award" for his efforts to make the Southern Tier a better place to live and work. He is also the recipient of "The David Malcom Award", in recognition of his Exemplary Service to the Homeless.

Francis is the author of the book, [Checchino: A Father & Son Journey Toward Dusk](#) and co-author of [Tomorrow's Weigh, the No Diet Approach to Weight Loss](#). He is presently writing the second addition to Checchino. His articles include, "Leveraging Workforce Research to Attract, Manage, and Retain High-Performance Employees", "Harnessing the Diversity and Power of Your Team! Developing and Sustaining Highly Effective Teams Ensures Your Competitive Edge", "Advancing the Bottom Line and Service Quality via a Culture of Employee Retention", which were published in [Infusion](#), the magazine of the National Home Infusion Association.

Dr. Battisti received his Ph.D. from Marywood University, Scranton Pennsylvania. His research focuses on the paternal influence of childhood obesity. Dr. Battisti and his wife, Dr. Helen E. Battisti, both avid runners and make their home in upstate New York.

Monday, September 20

10:00-5:00 Registration Open

12:00-2:00 Opening General Session/Keynote

Taking the Best of What we Know and Creating the Future we Need - Presented By: Dr. Francis Battisti, Battisti Management Affiliates

In this time of global uncertainty, health-care professionals are being confronted with unparalleled challenges, e. g. remaining positive in the face of grave uncertainty... additional regulations... the belief that individual efforts do not impact results... reacting to the financial uncertainty of an ongoing health-care crisis... all-the-while remaining focused on the goal of maintaining quality of care.

Join Dr. Francis Battisti as he uses the theme from Roman mythology, the Roman god Janus, who represented new beginnings, transitions, doorways and passages, and takes you on a journey of exploration, reconnecting, and discovery of practical ways to create the future we need. Drawing from the principles of Positive Psychology, participants will also better understand the importance of, and activities to, creating a Life Enhancing Organizational Culture.

Focused on growing professional and personal performance, this program will introduce participants to strategies that will assist with developing a resilient mindset and lifestyle for increased satisfaction and productivity. Ingredients of a resilient lifestyle will be explored and outlined.

2:30-3:30 Breakout Sessions

The Role of Rehab with Mental Health in Post-Acute Care - Presented by: Alicia Harper and Brandy White, Aegis Therapies (AL/NH)

Describe the characteristics of various psychiatric disorders. Verbalize the role of PT, OT, and SLP with the treatment of patients with mental health impairments. Identify assessment tools appropriate for patients with mental health impairments. Indicate treatment strategies appropriate for patients with psychiatric disorders.

How Providers Can Detect and Prevent Fraud - Presented by: Ross Cannon & Jeff Fucito, Mauldin & Jenkins (ALL)

Within this presentation, we will do a deep-dive on methods that providers can use to detect and prevent fraud. This presentation will cover financial fraud, as well as operational fraud, and offer potential solutions for communities. These can be in the form of recommended control procedures, monitoring measures, and other guidance on fraud risk factors and antifraud programs.

2:30-3:30 Breakout Sessions (continued)

The 7 Checchino Insights for Individual and Organizational Change - Presented by: Dr. Francis Battisti, Battisti Management Affiliates (ALL)

As health care leaders we are presently witnessing and assisting staff, residents, and their families with major changes in their lives and outlooks of living. By experience and situation, we realize that these changes often create taxing environments for individuals to live in and, in turn, to work in.

Reflecting on the learning that he gathered from this transformational caregiving experience, Dr. Battisti developed the 7 Checchino Insights. These insights include: *Trusting One's Instincts, Relishing the Moment, Learning, Respecting Family & Community, Acting with Dignity, Accepting Change and Maintaining Honesty.*

From the perspective of the 7 Checchino Insights as a strengths-based framework, this inspirational presentation with address significant issues that have impacted our living communities because of the Pandemic. Now is the time for us to decide what we need to do to reconnect with ourselves and our communities. Essential to reconnection is the need for re-establishing a sense of trust, communicating with compassion, and further developing a culture of caring and self-care.

Using an interactive engaging presentation style, Dr. Battisti will offer a pathway to identify changes that one desires to make and avenues of accomplishing the desired goals.

Blurring the Lines of Senior Living: Trends and Predictions for the Future - Presented by: Tim Mueller, SFCS & Meredith Boyle, Mather Lifeways (LPC)

Many seniors tell us that they don't want to or can't afford to "retire" and they definitely don't want their grandparent's retirement home. So, how do we look forward to know what the next generation of seniors desire? We can evaluate new trending data of two on-going longitudinal surveys, providing an in-depth look into how Baby Boomers and the Silent Generation are re-thinking their own retirement. The audience will be asked to compare their own knowledge of these trends and compare it to the next generation they wish to serve. The presentation will show examples of how some senior housing providers are "Blurring the Lines" creating new Senior Living Concepts & Ideas to meet the ever-changing needs and desires of the next generation.

Monday, September 20

4:00-5:00 Breakout Sessions

2021 State of Senior Living Overview - Presented by: *Tad Melton, Ziegler (LPC)*

In this session, Tad will draw on Ziegler Research's extensive resources to offer a contemporary overview of the senior living sector including: industry composition, updated demographic information, key strategic trends, impact of COVID-19, and more. In addition to key strategic trends, Ziegler has extensive data on COVID-19's impact on the sector and its impact both on current operations and strategic planning.

A Day in the Life of a Professional Liability Claim-Where is Your Organization at Risk - Presented by: *Walter Constantine, The Hauser Group (ALL)*

Discuss the general nature of how Professional Liability claims evolve and how these situations apply specifically to senior living business structures (ILU, Assisted Living, LifePlan, etc.). A part of this session will involve reviewing brief cases and responding in real time.

Strategic Capital Planning: Forward Thinking vs. Crisis Management - Presented by: *Rob Milam, zumBrunnen (ALL)*

To access capital and truly plan around mission, providers should have the tools to evaluate their communities condition and their financial needs and capacity. Community assessment methodologies, along with financial strategies to implement capital replacements, repairs, renovations, re-positioning, and expansions will be covered. This session reviews the fundamental questions that executives and board members need answered with the assistance of design and engineering professionals. This session is based on actual case studies of senior living communities for single- and multi- site providers. Two zumBrunnen white papers are made available to the audience: The first is a self-assessment for executives and boards to determine if their physical plant is being properly maintained utilizing industry recognized asset management tools and processes. The second paper is written from an objective position as to the fundamentals of replacement reserve studies, and the pros/cons of four industry standard replacement reserve funding plans.

Ageing in Place and Fair Housing: The Loss of "Independence" - Presented By: *Leslie Tucker & Kathi Williams, Williams & Edelstein (HUD)*

This session will discuss the fair housing issues that arise for a housing provider when an aging resident is no longer able to independently care for themselves due to a decline in physical and/or mental health.

5:15 Opening Reception

6:45 Dinner on your own

Tuesday, September 21

8:00-5:00 Registration

8:30-9:30 Breakout Sessions

The Future Is...A New Frontier of Senior Wellness + Population Health - Presented by: *Kristy Yoskey, Healthpro-Heritage (LPC)*

The future of senior care & wellness requires us to reach beyond the four walls of traditional lifestyle/care centers to a much more inclusive 'virtual community' of seniors. This progressive, largescale vision for the future requires a platform for virtual, or remote touchpoints - built on a foundation of predictive analytics and Next Gen partnerships - that will effectively accelerate high-quality, proactive care across all settings.

COVID-19 Relief Funding: Proving you Needed it - Presented by: *John Harned, BKD (ALL)*

Senior living industry leaders will analyze the various sources of stimulus funding, the differences between forgivable grants and repayable loans and the necessary accounting requirements to avoid the risk of repayment. They will leverage decades of experience with government grants and programs to offer insight on how to properly account for lost revenues and new expenses associated with the pandemic, as well as avoid the risk of "double-dipping" by properly matching funding sources to expenditures.

How Virtual Reality Changes the way we Train - Presented by: *Erin Washington, Embodied Labs (AL/NH)*

In this presentation, attendees, will learn about and experience first-hand the benefits of using immersive training tools designed especially for people who care for and support older adults. Discover the ways that engaging with immersive training in the VR can accelerate learning, lead to deeper understanding of aging and older adults, and allow caregivers to develop rapid insights that lead to significant changes in workplace behaviors, habits, and attitudes, including: stronger emotional and cultural intelligence, better practical understanding of person-centered care, stronger communication and conflict resolution skills, and greater confidence in providing care.

Onward: Creating Normalcy in the Midst of a Pandemic - Presented by: *Jeff Helms, Park Springs*

As the coronavirus pandemic shut down much of the world and shook the senior care industry, Park Springs Life Plan Community found a creative solution to maintain services and person-directed care through a 75-day staff lock-in. Emerging from the lock-in, the services continued while the community's 500+ members remained safe from COVID-19. Jeff will share lessons learned on how to effectively create a response plan to a pandemic or other crisis situation without sacrificing services and person-directed care, as well as the important role of culture in implementing those plans.

9:30-12:30 Tradeshow Open

12:00-1:00 Lunch

Tuesday, September 21

1:00-2:00 Panel Discussions

Life Plan Communities - Gwen Hardy (Presbyterian Homes of Georgia, GA), David Buckshorn (Wesley Commons), Bob Benson (Rolling Green Village)

Assisted Living/Nursing Home - Deke Cateau (AG Rhodes, GA), Tim Knight (Park Springs, GA), Katie Jayne (Bishop Gadsden)

Affordable Housing Communities - Andy Landrum (Clairmont Oaks, GA), Russ Bell (The Finlay House), Amanda Mershon (St John Towers)

2:30-3:30 Breakout Sessions

Refinancing Your Affordable Housing Property for Preservation and Expansion - Presented By: *Gates Kellett, Gates Dunaway Group (HUD)*

With HUD not longer granting the funds necessary to build new affordable housing for our aging population, it is more important than ever that owners understand how to leverage their properties for long term preservation and for expanding their mission by building new properties. The session will educate owners, board leaders, and executive management staff on the typical strategies owners use for refinancing their properties, and how the proceeds from the refinancing can be used for preservation and for mission expanding through new development.

What you Need to Know Right now - Accounting and Reporting Updates in 2021 - Presented By: *Daron Tarlton and Sabrina Preston, Dixon Hughes Goodman, LLP (ALL)*

Attendees will gain a better understanding around implications of recent FASB and GASB accounting pronouncements and standards for senior living providers. Learn the latest about COVID-related State and Federal Provider Relief Funds and related financial reporting implications. Determine the financial impact of single audits, leasing standards, and other accounting topics to your organization's financial statements and disclosure.

The Purpose, Meaning, and Pursuit of Happiness - Presented By: *Dr. Francis Battisti, Battisti Management Affiliates (ALL)*

To seek a better life is foundational to creating a sense of meaning in life. Since happiness is determined more by one's state of mind than external events, it is our everyday choices that create our level of happiness.

Join Dr. Francis Battisti as he leads you on a tour of exploration of your happiness quotient. What are the mind-sets, behaviors and choices that lead an individual toward a sense of happiness? This sense of personal understanding leads one to also experience compassion, understanding and a greater level of emotional intelligence.

This presentation will provide a unique odyssey for participants to assess how they are living, and, if desired, how they can transform themselves to develop a more enriching, productive, and satisfying experience.

2:30-3:30 Breakout Sessions

Positioning Beyond the Pandemic - Presented By: *Emily Jimerson, SFCS, Hoppy Sell and Rob Love (LPC)*

We are one year into a global pandemic that has disproportionately affected seniors. There has been a fundamental shift in the mentality of seniors and many possess an unsettled view of senior living. Not only do communities need to understand this new mentality for the betterment of current residents, but how it will persist beyond the pandemic and affect the near future. This session will explore how/what seniors are currently feeling, inventive ways in which communities can respond, and the tools available to communicate this new positioning.

4:00-5:00 Breakout Sessions

The Role of Technology in Fall Prevention - Presented By: *Beth Reigart, Functional Rehab (AL/NH)*

The world of technology continues to evolve as an integral component of healthcare. New, innovative resources, are now available to aid in fall detection and prevention. This presentation will review how technology can be used to detect falls, assess risk, reduce or prevent occurrences. Discussion will focus on three categories of technologic applications: wearables, in-home devices, and healthcare settings. At the end of this session, the participants will understand the potential for fall prevention technology to drive successful clinical outcomes.

Insights into Value-Based Care & How to Partner With ACOs - Presented By: *Rebecca Molesworth, Trella Health (AL/NH)*

Post-acute care continues to grow as a focus area for accountable care organizations (ACOs). In order to be recognized as a preferred partner, post-acute providers must show their value to become a part of an ACO's network. This presentation will discuss the key insights on ACOs and the way they evaluate post-acute partnerships. Learn the best ways to bring value to your ACO partners and build better long-term relationships.

Like Roller Coasters? Construction Projects: Managing Budgets While Maintaining Vision - Presented By: *Jeff Fogle, Batson Architects (LPC)*

Presbyterian Homes of Georgia has recently occupied a 72-acre Life Plan Community. This presentation will describe how the Owner/Architect/Construction team successfully handled budget and schedule challenges. A true collaboration team approach saved the day. Presentations by each member of the team will take place, with a specific focus on issues each member faced and how these were successfully addressed.

Wednesday, September 22

8:30-9:30 Breakout Sessions

Visitor and Staff COVID/Health Screening Management in the COVID Era - Presented By: *Lever Stewart, Accushield (ALL)*

This session will feature a panel discussion with several operators. Questions to be discussed will focus on how to handle health screening reporting for both staff and visitors, including outside caregivers? How do you track people coming into your community? Do you think Infection Prevention Programs are important to the ongoing success of senior living communities? How do you handle family visitation and the need for safe family visit practices from a health screening standpoint?

The Search for the Truth in Employee Investigations - Presented By: *Traci Montgomery, Wesley Woods Senior Living (ALL)*

Most managers are faced with conducting an investigation at some point in their careers. It may be for a workers compensation claim or harassment. One thing is clear, at the end of the investigation you want to be fair and acquire the right information to make a reasonable decision. You also want to stay within the legal limits of the law.

This session will answer some basic questions regarding internal investigations and help you feel confident if you are asked to lead one at your company. We will answer some basic questions and walk through some of the pitfalls that face every manager as they try to find “the truth”.

Incorporating the Wisdom of the Ages Into One’s Lifestyle - Presented By: *Dr. Francis Battisti, Battisti Management Affiliates (ALL)*

As health-care professionals, our lives are full of opportunities that allow us to forget about being good to ourselves. These opportunities while seemingly noble and needed, if not handled consciously, can start a process of destruction in our bodies and minds.

Drawing from the research of the Blue Zones, that grew out of the demographic work about longevity and quality of life, this program will identify and explore 9 health-enhancing practices that can be implemented by the participants.

The Digital Transformation of Senior Living: Adoption & Implementation - Presented By: *Nick Patel, Steve McDonald, Paul Steinichen, Thrive Well Tech (ALL)*

Break down existing and emerging ‘smart’ technology ecosystems and trends being incorporated into the master planning of new and repositioned life plan communities. Explore the importance of infrastructure design in supporting prominent technology solutions and how this impacts the master planning and overall design of senior living communities. Ultimately, gain an understanding of how provider organizations adopt and deploy smart technologies, including AI and predictive modeling, safety, and quality of life for residents.

In addition, how these technologies can be leveraged to improve clinical decision making and enhance the overall sense of community, safety, and quality of life for residents.

10:00-11:00 Breakout Sessions

Preserving Memories: Memory Care That Slows the Progression of Alzheimer’s and Dementia - Presented By: *Tim Knight, Park Springs (AL/NH)*

This session will provide education to participants on innovations in memory care that can slow the progression of Alzheimer’s and Dementia, including the household model of person-centered care, wellness programs such as a Mediterranean diet, and mindfulness exercises. In addition, sensory cues incorporating tastes, smells, and sounds from members’ lives will also be discussed.

Don’t Let a Crisis go to Waste! Moving a Strategic Project Forward During Uncertain Times - Presented By: *Chris Keysor & Felicia Sveda, Lenbrook & Alejandro Giraldo, THW Design (LPC)*

Prior to the COVID-19 pandemic, the Lenbrook Expansion Project had strong market demand and the board decided to begin preliminary construction prior to having full financing in place. As the full impact of COVID-19 emerged, there were many questions presented by several stakeholders of the project, making it even more important to maintain communication and make critical decisions to continue moving forward, maintain the stability of the project, and deliver the project within the time, budget, and level of quality expected. After the presentation, attendees should have an understanding of the process defined by the team, the importance of the “sense of urgency” as well as the challenges and expectations before the crisis, during, and after.

Bridging the Expectations Gap - Equipping Your Community’s Supervisors to Move Your Culture FORWARD - Presented By: *John Harned, BKD (ALL)*

In this session, participants will learn a different way of approaching supervision of direct care-givers and other front-line staff; coaching skills vs. traditional methods. Coaching skills empower the supervisor to strengthen the work relationship with the employee, resulting in reduced staff turnover, enhanced clinical and satisfaction outcomes, and reduced operating cost to the community.

11:30-12:30 General Session/Closing Keynote

Being Ready to Create our Next Chapter - Presented By: *Dr. Francis Battisti, Battisti Management Affiliates*

Now is the time to create the future of our community, the way we want it to be. Continuing the theme from Roman mythology, the Roman god Janus, who represented new beginnings, transitions, doorways and passages, Dr. Battisti will lead us in closing our conference by looking at where we have been, where we are today and what is it that we want to create for our next chapter.

Conference Registration Information

First Name	
Last Name	
Title	
License Number (s)	
Office Number	
Email	
Organization	
Street Address	
City	
State	
Zip Code	

As a result of being registered, each registrant consents and agrees to being photographed and adhering to the safety pledge.

Registration Fees

	Early (Before August 20)	Late (After August 20)
*LeadingAge Provider Member/CASP Provider Member	\$425	\$500
*Additional Provider Members from the same property/location	\$395	\$450
Provider Member One-Day (circle one) M T W	\$225	\$300
*Non-Member Provider	\$550	\$650
*Business Firm Member Rate	\$1800	\$1800
*Business Firm Members (who already paid their 2021 Dues)	\$1200	\$1200
Total Fees		

No refunds after August 20, 2021. All cancellation requests must be made in writing. Written cancellations made between July 20 - August 20, 2021 will receive refunds, minus the cancellation fee of \$100 per registrant cancelling. We encourage substitutions. Registration fees include the following: educational sessions, CEUs, breaks, continental breakfast both days, luncheon w/exhibitors, Monday evening social, Closing Keynote Lunch, and entry to tradeshow.

Attire is business casual, dress smart if you are sensitive to certain temperatures. The conference has been approved for up to 12 CEU hours for SC attendees and up to 12 CEU hours for GA attendees regarding the following professions: Nursing Home Administrators (GA & SC), Social Workers (GA & SC), and Nurses (SC).

Mail form and check payable to either:

*Georgia Institute on Aging
1440 Dutch Valley Place; Suite 120
Atlanta, GA 30324
FAX: 404-872-1737*

*South Carolina Institute on Aging
2711 Middleburg Drive, Suite 309-A
Columbia, SC 29204
FAX: 803-988-1017*

HOTEL REGISTRATION INFORMATION

Hilton Head Marriott Resort & Spa
One Hotel Circle
Hilton Head Island, SC 29928
1-888-236-2427 OR 843-686-8478

Group Name & Rates
LeadingAge GA/SC Conference
Standard \$169 / Ocean View \$199 / Ocean Front \$219
The Hotel Rooming Block will be available until Aug. 11 or until the room block is FULL.
Link to book online: [Book your group rate for LeadingAge SC & GA](#)



Attendee and Exhibitor Health and Safety Pledge

The LeadingAge Georgia and South Carolina 2021 Annual Conference is committed to keeping attendees safe during the event. As a member of the LeadingAge community, we each play an important role to keep each other as safe as possible.

As a LeadingAge GA/SC Conference attendee or exhibitor, I pledge to do my part to keep myself, my fellow attendees, and other people healthy and safe by agreeing to the following:

I acknowledge LeadingAge GA/SC strongly encourages attendees to either be fully vaccinated or recently had a negative COVID-19 test before traveling to or attending the LeadingAge Annual Meeting.

I understand that each person has a different level of comfort and will adhere to the safety practices associated COVID-19 accordingly. I respect each person's individual choice.

I will follow LeadingAge safety guidelines on site, including wearing a mask in designated mask zones.

I will stay at home or in my hotel room if I am feeling sick.

Thank you for doing your part in helping keep the Joint LeadingAge GA/SC Annual Conference a safe and comfortable experience for everyone.