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# **Aging Services of California** **2007 Annual Conference**

***Aging Well into the Future***

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**May 7-9, 2007**

Pre-Conference – May 7, 2007

**Monterey Marriott  
and Conference Center**

Early-Bird deadline  
**April 7, 2007**

Register on-line  
**[www.aging.org](http://www.aging.org)**

## THANK YOU TO SPONSORS

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Sodexo Senior Services – Tuesday Evening Social  
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# Aging Well into the Future



Double entendres usually are reserved for entertaining, even risqué use. But “Aging Well into the Future” is so right – with “well” referring both to well-being and to far or distant – that its application as the theme of the Aging Services of California 2007 Annual Conference was irresistible.

Consider: This year healthcare is clearly positioned as the top priority for the Governor and State Legislature. The media has focused considerable coverage on the issue as well. And, not surprisingly, public concern over healthcare today and in their future is as high as it's ever been.

Healthcare – the future – long-term care. With these three fundamental concerns being inseparable, it is only natural to promote their connection as the central theme of this conference. Of course, “Aging Well into the Future” also proudly reflects the services, staff and social accountability that distinguish quality nonprofit senior living and care in California.

This year's Annual Conference features dozens of outstanding education sessions, renowned keynote presentors, entertaining social events and perhaps most importantly the opportunity to network with your peers.

*Please enjoy your time in Monterey as Aging Services of California welcomes you to future of aging services.*

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**IFC=Inside Front Cover**

**IBC=Inside Back Cover**

## SCHEDULE-AT-A-GLANCE

	RESIDENTS' DAY		TRUSTEES' DAY
	MONDAY, MAY 7	TUESDAY, MAY 8	WEDNESDAY, MAY 9
7 A.M.			
8 A.M.		Continental Breakfast 7:00 - 8:30 am	Exhibit Hall & Breakfast 8:00 - 10:30 am
9 A.M.		Opening Session 8:30 - 10:15 am	
10 A.M.		Sessions 10:30 - 11:30 am	Sessions 10:30 - 11:30 am
11 A.M.			Business Luncheon 11:45 am - 1:15 pm
NOON		Exhibit Hall & Lunch 11:30 am - 2:00 pm	
1 P.M.			
2 P.M.			Sessions 1:30 - 3:30 pm
3 P.M.		Sessions 2:15 - 5:30 pm	
4 P.M.			Closing Session 3:45 - 4:45 pm
5 P.M.			
6 P.M.			
7 P.M.		Join Us for Tuesday's Social Event - Historical Monterey Gardens 6:30 - 9:30 pm	Aging is an active Verb Premiere 6:00 - 10:00 pm
8 P.M.			
9 P.M.			





Aging Services of California is the leading advocate in the state for quality senior living and care. The goal of the association is to help develop progressive and innovative strategies for Californians to age *well* into the future. Paramount concerns in aging services include providing more options for care; continuity, accessibility and flexibility of services; reasonable and secure financing; affordable senior housing; healthcare; education and training programs and research and technological advances – in general, ensuring all of us can age independently and with dignity.

Aging Services of California (formerly California Association of Homes and Services for the Aging) represents more than 400 nonprofit providers of senior living and care – including affordable housing, continuing care retirement communities, assisted living, skilled nursing, and home and community-based care. Aging Services of California's advocacy, educational programs and communications help its members best serve the needs of more than 80,000 seniors. The public-interest association also directs a public education campaign – "Aging is an *active verb*" – and an extensive consumer education effort featuring its website, [www.aging.org](http://www.aging.org), as a key resource. Founded in 1961, Aging Services of California is celebrating its 46<sup>th</sup> year of public service.

### Region Leadership Breakfast

Tuesday, May 8, 7:00 – 8:15 a.m.

Region Leadership is invited to a breakfast prior to the Opening Session.

### Resident Luncheon

Tuesday, May 8, 11:30 a.m. – 1:00 p.m.

Residents are invited to a luncheon hosted by Board Chair Dave Ferguson and Aging Services President and CEO Anne Burns Johnson. This luncheon is generously sponsored by **Gerontological Services, Inc.**

### MLRC Breakfast

Wednesday, May 9, 8:00 – 9:30 a.m.

Multi-Level Retirement Communities members are invited to network and discuss items of mutual interest.

### Trustee Breakfast

Wednesday, May 9, 8:00 – 9:30 a.m.

Trustees and their administrators are invited to a breakfast hosted by Aging Services President and CEO Anne Burns Johnson.

### Welcome Reception

Monday, May 7, 5:30 – 7:00 p.m.

Get started on the right foot. Come meet and greet your fellow colleagues in a relaxed atmosphere. This reception is generously sponsored by **American Baptist Homes of the West.**

### Welcome Breakfast

Tuesday, May 8, 7:00 – 8:30 a.m.

Begin your day with a quick bite before heading into the Opening General Session.

This breakfast is generously sponsored by **Ziegler Capital Markets Group.**

### Opening General Session

Tuesday, May 8, 8:30 – 10:15 a.m.

MAKE SOME NOISE

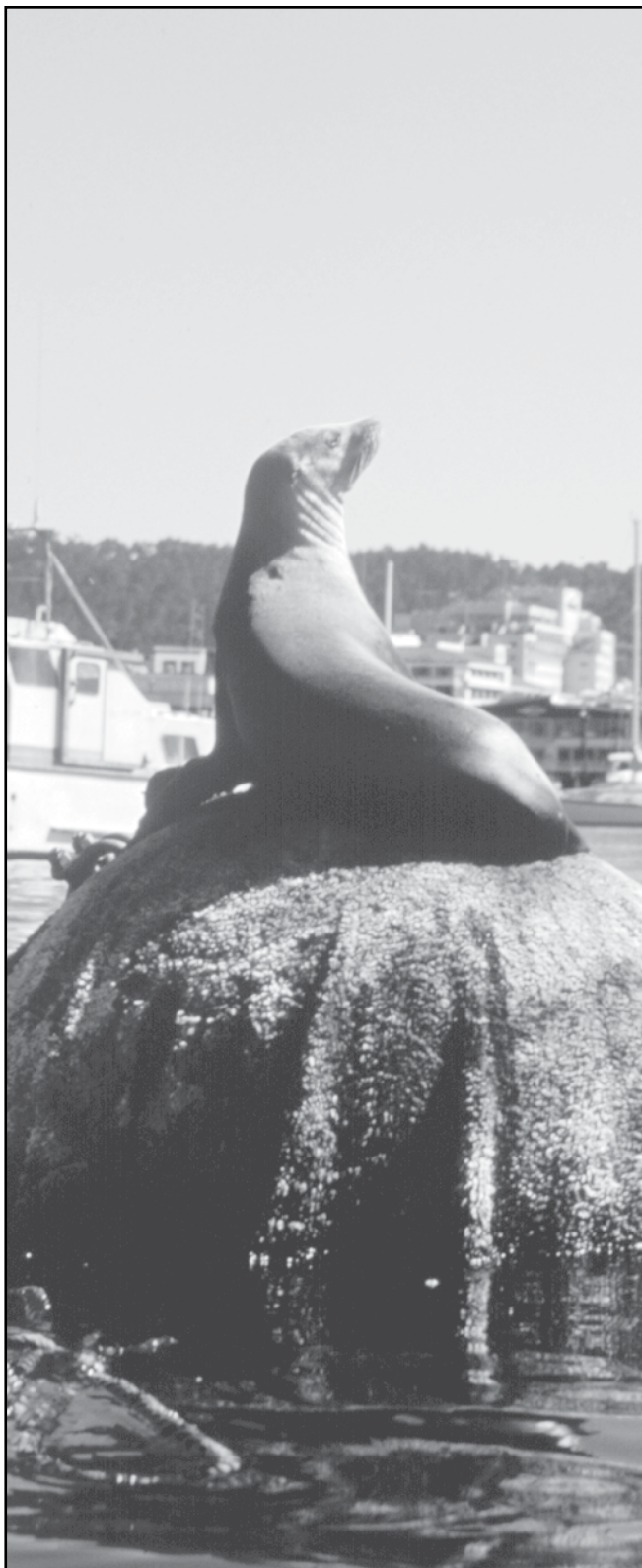
As the former director of communications for Harley-Davidson Motor Company, Ken Schmidt, a communications expert, played an active role in one of the most celebrated turnarounds in corporate history. Within a few short years, Harley-Davidson became one of the most visible and frequently reported-on companies in the world, while sales of its motorcycles rocketed upward.

During this session you will –

- Hear about the struggle to restore Harley-Davidson's image and re-ignite consumer demand for its motorcycles.
- Learn how successful corporate cultures must maintain relationships with veteran customers and innovatively pursue new ones.

**Faculty:** Ken Schmidt, Independent Consultant

**Quality First:** 1 – AAHSA's Covenant



### **Tuesday Evening Social**

Historical Monterey Gardens

**Tuesday, May 8, 6:30 p.m. – 9:00 p.m.**

Experience the beautiful mission style gardens in the heart of Monterey's historic wharf. You'll be entertained by the sounds of Spanish guitars, blended with Latin percussion that create the gypsy-influenced sound of Cerro Negro. The gardens are a five-minute walk from the Monterey Marriott, located just behind the conference center. Comfortable shoes are recommended for this outdoor experience. This event is generously sponsored by **Sodexo Senior Services**.

### **Annual Business Meeting and Luncheon**

**Wednesday, May 9, 11:45 a.m. – 1:15 p.m.**

Join us Wednesday for Aging Services Annual Business Meeting and Luncheon. Board Chair Dave Ferguson will officiate as we discuss issues important to the Association. We'll also recognize several award honorees and Silver Star recipients.

### **Aging is an active verb Campaign Launch**

**Wednesday, May 9, 6:00 – 10:00 p.m.**

Lights. Camera. *Active*. Annual Conference attendees will be introduced to Aging Services of California's new multimedia public education campaign. The "premiere" event will be held the evening of May 9 and will include an exciting slideshow featuring members' most active residents. While "Aging is an *active verb*," the campaign's theme, has been shared with members since the beginning of the year in the association's print and online communications, May 2007 marks the official launch of the campaign. The statewide public outreach effort will feature TV and print public service announcements, on-line education/marketing, media outreach and other on-going activities to promote senior living and care providers as advocates of healthy, safe, independent and active aging. This event is generously sponsored by **American Baptist Homes of the West**.



Dance the night away to the musical styling of Blind Justice

## EDUCATION TRACKS

### About the tracks...

Participants may attend any education session. The tracks have been designed for provider types or areas of interest:

- All
- Board/Trustee
- Skilled Nursing Facilities (SNF)
- Affordable Senior Housing (Housing)
- Continuing Care Retirement Communities, Multi-Level Retirement Communities and Residential Care Facilities for the Elderly (CCRC/MLRC/RCFE)

### Sessions in each track are designed to...

- Spot emerging trends in the long-term care continuum;
- Affirm successful nonprofits' traditions;
- Identify new partners and opportunities;
- Retool your facility with the latest information on marketing, human resources, finance, development and regulatory compliance;
- Revitalize your resident programs with state-of-the-art activities, outreach efforts and wellness models;
- Rethink your recruitment and retention strategies;
- Focus on the latest research and best practice models on aging-related issues; and
- Explore different leadership styles/tools.

### Continuing Education Units

*Continuing education units (CEUs) have been requested from the following licensing agencies:*

- Nursing Home Administrators Program (NHAP)
- California Board of Registered Nursing (BRN)
- California Department of Social Services, Community Care Licensing Division for Residential Care Facilities for the Elderly (RCFE)
- California Board of Behavioral Sciences (BBS)
- Certified Aging Services professional (CASP)
- The State Bar of California (MCLE)
- California Board of Vocational Nursing & Psychiatric Technicians (LVN)
- Category II (Non-ACHE)

Watch future issues of agendum (Aging Service's electronic newsletter) and the Aging Services of California website at [www.aging.org](http://www.aging.org) for updates on hours and approval numbers.

## Closing Keynote Session

### EVERYONE IS MULTICULTURAL: BRIDGING CULTURAL INFLUENCES FOR LEADERSHIP SUCCESS

Wednesday, May 9

3:45 – 4:45 pm

Designed to help organizational leaders, leadership candidates, and the general public gain new insight and direction into the current workplace diversity agenda. Everyone that is Multicultural can help anyone gain an appreciation for themselves and others and learn what it takes to succeed in the business world today. It's the perfect guide for individuals of all cultural influences who want to improve performance, workplace relationships, and diversity initiatives.

During this session you will:

- Identify cultural influences and manage stereotypes.
- Learn how to gain corporate comfort and improve culturally diverse relationships.
- Discover three steps to cultural competency and the values of redefining diversity.

Faculty: Dr. Pamela Johnson, Author, *Everyone Is Multicultural: Bridging Cultural Influences for Leadership Success*

Quality First: 1 – AAHSA's Covenant  
6 – Human Resources Development



# Aging Services of California's 2007 Expo

Take advantage of your time at the Annual Conference to visit with vendors providing cutting-edge products and services that you need to run your facilities.

## Win Cash

At 9:45 a.m. Wednesday, we'll have a \$500 cash drawing in the Exhibit Hall. To enter, drop your business card in the drawing bin at the entrance. **You must be present to win.**

## Approved Vendors

*Offering savings and/or value-added services to Aging Services' members*

- IntegResource, Inc.
- Lewis & Associates Insurance Brokers, Inc.
- Seniority, Inc.
- StoneTapert Financial and Insurance Services, LLC
- Vital Research, LLC

## Premier Partner Exhibitors

*Supporting Aging Services of California at the highest level*

- Cain Brothers
- Hanson, Bridgett, Marcus, Vlahos & Rudy, LLP
- Lewis & Associates Insurance Brokers, Inc.
- Morrison Senior Dining
- Sodexho Senior Services
- Stone Tapert Financial and Insurance Services, LLC
- Ziegler Capital Markets Group

## Enhanced Member Exhibitors

*Making a commitment to Aging Services*

- Arthur J. Gallagher & Co. Insurance Brokers of California
- Ecologically Sound Medical Services
- Gerontological Services, Inc.
- Hallmark Rehabilitation
- Herbert J. Sims & Co., Inc.
- IntegResource, Inc.
- Irwin.Pancake Architects
- Kellogg and Andelson Accountancy Corporation
- LTC Risk Consulting Services
- McLarand Vasquez Emsiek & Partners, Inc.
- Moss Adams, LLP
- New Life Management & Development, Inc.
- Seniority, Inc.
- Vital Research, LLC
- Wattenbarger Associates

## Exhibit Hall Hours

### Tuesday, May 8

11:30 a.m. - 2:00 p.m.

(Lunch served in the Exhibit Hall)

### Wednesday, May 9

8:00 a.m. - 10:30 a.m.

(Breakfast served in the Exhibit Hall)

- \*ABD Insurance and Financial Services
- \*Achieve Healthcare Technologies
- \*Advance Textiles of California
- \*ALC Healthcare Network, Inc.
- \*American HealthTech
- \*Anderson Health Information Systems, Inc.
- \*Answers On Demand
- \*aQuire Training Solutions
- \*Argo Insurance Group
- \*Arthur J. Gallagher & Co. Insurance Brokers of California
- \*Arthur Shuster, Inc.
- \*Best Bath Systems
- \*Burger Rehabilitation Systems
- \*Cain Brothers
- \*Capmark Financial Group
- \*CAREFOAM USA
- \*Carlson Medical Equipment Distributors, Inc.
- \*CCRC Actuaries, LLC
- \*Compass Flooring, Inc.
- \*Consonus Health
- \*Corporate Express
- \*Creative Action LLC
- \*Design Purchase Link
- \*Ecologically Sound Medical Services
- \*Family Virtual Visits
- \*Furniture One
- \*Gerontological Services, Inc.
- \*Graham-Field Health Product
- \*Greystone Communities, Inc.
- \*Guardian Systems, Inc.
- \*Hallmark Rehabilitation
- \*Hansen, Hunter & Company
- \*Hanson, Bridgett, Marcus, Vlahos & Rudy, LLP
- \*Harbor Linen
- \*Haskell Community Developers
- \*Healthcare Source
- \*Heffernan Insurance Brokers
- \*Herbert J. Sims & Co., Inc.
- \*HKIT Architects
- \*Home Depot Supply
- \*HomeFree, Inc.
- \*HPSI Group Purchasing
- \*Innovatix
- \*IntegResource, Inc.
- \*Invacare Continuing Care Group
- \*Irwin.Pancake Architects
- \*Keane Care, Inc.
- \*Kellogg and Andelson Accountancy Corporation
- \*Kindred Pharmacy Services
- \*Kwalu, Inc.
- \*Lantz-Boggio
- \*Lewis & Associates Insurance Brokers
- \*LRS Architects, Inc.
- \*LTC Risk Consulting Services
- \*Lumetra
- \*M.C. Healthcare Products, Inc.
- \*McLarand Vasquez Emsiek & Partners, Inc.
- \*Morrison Senior Dining
- \*Moss Adams, LLP
- \*Neofloor by Lees Carpets
- \*New Life Management & Development, Inc.
- \*Nutrition Management Services
- \*Orcutt/Winslow
- \*Peoplefirst Rehabilitation
- \*Perkins Eastman
- \*PharMerica
- \*PointClickCare.com
- \*Primecare Pharmacy
- \*Reserve Analysis Financial
- \*Planning, LLC
- \*Resource Systems
- \*Senior Crimestoppers
- \*Seniority, Inc.
- \*Smart CareGiver Corporation
- \*Sodexho Senior Services
- \*Stanley-Senior Technologies
- \*StoneTapert Employee Benefits & Financial Services, LLC
- \*Sundt Construction, Inc.
- \*Sunrise Medical
- \*Systems Technologies
- \*Tecogen, Inc.
- \*The Marlin Company
- \*Therapy Specialists
- \*Tidewater Group Purchasing
- \*Touchtown, Inc.
- \*Upstairs Solutions LTC
- \*Utility Cost Management
- \*Vicenti, Lloyd and Stutzman CPAs
- \*Vigil Health Solutions, Inc.
- \*Virtual Care Provider, Inc.
- \*Vital Research, LLC
- \*Wattenbarger Associates
- \*Wells Fargo Multifamily Capital
- \*Windmill Software
- \*Ziegler Capital Markets Group

\*Denotes Aging Services of California Associate Members



## Monday, May 7, 2007

Aging Services of California invites you to arrive early in Monterey to maximize your educational experience with one of five Annual Conference Pre-Conference Workshops on Monday, May 7, 2007. Lunch is included in the registration fee.

**The “full-conference package” fee does NOT include pre-conference workshops, and no discounts are offered.**

### PRE-CON 1

#### Leadership Development Program – Part II

**8:30 a.m. – 3:30 p.m.**

The Leadership Development Program, - Part II is a continuation of Part I where professionals are provided with a unique perspective on five exemplary leadership practices as outlined in the bestselling book *The Leadership Challenge*.

**Important Note: This program is limited only to participants who attended Part I February 2007.**

**Faculty:** Michele Holleran, founder, Holleran Consulting

*This program has been submitted for approval for 6 hours of continuing education units as follows: NHAP, RCFE, BRN, CASP*

### PRE-CON 2

#### Building Community: The Foundation of Person-Centered Care

**8:30 a.m. – 3:30 p.m.**

There are numerous studies that point to the need to change organizational cultures away from the traditional institutional model. This session will provide participants with the leadership and culture-building tools that will enable you to map out and launch the journey of building a positive and hopeful culture. Grounded in reality, the presenters will discuss just how daunting the journey from institutional care to person-centered care can be. You will leave inspired with the evidence-based, practical ideals designed to build community that can be implemented immediately.

**Faculty:** Barry Barkan, Co-Director, Live Oak Institute and David Farrell, Executive Director, Medical Hill Rehabilitation Center, Oakland

*This program has been submitted for approval for 6 hours of continuing education units as follows: NHAP, RCFE, BRN, CASP*

### PRE-CON 3

#### Management and Occupancy Review – Steps to Superiority

**8:30 a.m. – 11:30 a.m.**

Despite what you may have heard from your local contract administrators, it might be easier to balance the state budget than it is to get a Superior rating on your next Management and Occupancy Review. Even so, there are a number of things that you can do to better

your odds of being more than Above Average. Learn effective strategies on how to better organize tenant files, learn techniques to better prepare your staff and how to respond to a Summary Report and the process through which you can file an appeal.

**Faculty:** To be announced.

*This program has been approved for 3 hours of continuing education units as follows: CASP*

### PRE-CON 4

#### Budget Submissions and Rent Increases – Steps to Success

**12:30 p.m. – 3:30 p.m.**

How many times have you submitted your budget or a rent increase to your local contract administrator only to learn that it could not be processed because the package was incomplete? The good news is that you are not alone. This session will try to make sense of a process that seems to be ever changing. During this session you will learn about the difference between submission requirements for a budget-based project and an Operating Cost Adjustment Factor project, how to respond to requests from your contract administrator and effective strategies on how to get your budget submission approved the first time...really.

**Faculty:** Representatives from: LA MOMOD Corporation, CAQUADEL

*This program has been approved for 3 hours of continuing education units as follows: CASP*

### PRE-CON 5

#### Aging and Cognition: The Maze of Assessment, Differentiation & Intervention Management

**8:30 a.m. – 4:00 p.m.**

This session is twofold: to help the healthcare professionals in various disciplines identify and treat delirium, depression, and dementia while differentiating one form of dementia from another; and to provide several methods of managing challenging behavior in order to successfully navigate the changing face of the disease.

**Faculty:** Dr. Susan McPherson, Staff Psychologist, VA Medical Center in Minneapolis

*This program has been submitted for 7 hours of continuing education units as follows: NHAP/P, RCFE – Dementia Credit, BRN, BBS, CASP*

## ALL

### 1A WELLNESS WITHOUT WALLS

**Tuesday, May 8**

**10:30 a.m. – 11:30 a.m.**

- Learn how wellness can be linked throughout the continuum of care and how this strategy will build a culture of wellness without walls.
- Discover how to create a cohesive and communicative wellness team from constituencies throughout the facility to effectively eliminate silos.
- See how proven outcomes show providing wellness opportunities and structure for employees, engages the residents and provides a framework for better health and healthcare cost savings.

**Faculty:** Cynthia Lauer, National Director of Wellness and Nutrition Services, Sodexo Senior Services

**Quality First:** 5 – Continuous Quality Improvement  
6 – Human Resources Development

### 2A MARKETING MIRACLE: "THE BAKERSFIELD VIEW"

**Tuesday, May 8**

**10:30 a.m. – 11:30 a.m.**

- Learn how a 30 year-old CCRC changed their marketing focus to move from having over 50 vacancies to developing a waiting list in 10 months.
- Discover how to provide a format to develop strong partners among satisfied residents to act as speakers, guides, hosts, and peers to the new resident/family members.
- Learn how to build a strong leadership/management team on marketing through training, rewards and incentives for making progress toward the mutual goal of higher occupancy.

**Faculty:** Ted Burgess, Executive Director, Rosewood Retirement Community

**Quality First:** 4 – Community Involvement  
6 – Human Resources Development  
8 – Consumer Participation

### 3A DISCOVER THE MEANING OF LIFE IN JUST ONE HOUR

**Tuesday, May 8**

**10:30 a.m. – 11:30 a.m.**

- Through stories, song and audience participation learn how to build goodwill with key constituents.
- Discover how to build morale and increase organization loyalty.
- Learn how to take an inward look at yourself to find the humor in life.

**Faculty:** Anthony Cirillo, Anthony's Song, International Healthcare Marketing Consultant

**Quality First:** 5 – Continuous Quality Improvement  
7 – Consumer-Friendly Information

### 4A PROBLEM GAMBLING AND OLDER ADULTS

**Tuesday, May 8**

**10:30 a.m. – 11:30 a.m.**

- Learn how to recognize the signs of problem gambling in older adults.
- Talk about older adult problem gambling prevention and the information and treatment resources that are available.
- Learn about the current research that is being conducted on older adult problem gambling and how to apply it to a facility program.

**Faculty:** Martha Jessup, Associate Adjunct Professor, University of California, School of Nursing, San Francisco

**Quality First:** 7 – Consumer Friendly Information  
8 – Consumer Participation

### 5A UNDERSTANDING AND PREVENTING HARASSMENT IN THE WORKPLACE

**Tuesday, May 8**

**2:15 p.m. – 4:15 p.m.**

- Learn the importance of maintaining a work environment based on respect and free of harassment.
- Identify types of harassment and discrimination that exists as well as specific behaviors that may be considered harassment.
- Understand the rights and responsibilities regarding harassment and actions to take as a supervisor when harassment or discrimination takes place.

**Faculty:** Linda Pacheco, Training and Development, Southern California Presbyterian Homes

**Quality First:** 6 – Human Resources Development

## 6A CORPORATE STRUCTURING FOR THE FUTURE

**Tuesday, May 8**

**2:15 p.m. – 4:15 p.m.**

- Understand the roles of parents and subsidiaries, sole member organizations, retained powers and other methods for structuring and controlling distinct activities.
- Learn how to preserve tax exemption, minimize unrelated business taxable income, and engage in new activities, including for-profit businesses.
- Review liability protections, use of LLCs and other issues associated with corporate restructuring.

**Faculty:** Paul Gordon, Partner and Pamela Kaufmann, Partner, Hanson, Bridgett, Marcus, Vlahos & Rudy, LLP

**Quality First:** 2 – Governance Accountability

## 7A THE SCIENCE BEHIND MAINTAIN YOUR BRAIN

**Tuesday, May 8**

**2:15 p.m. – 4:15 p.m.**

- Learn how “Maintaining Your Brain” can minimize or delay the potential loss of memory and cognitive function.
- Discover simple activities that can have an immediate benefit on brain health.
- Learn the four major areas of activity – mental stimulation, physical exercise, healthy diet and social and emotional well-being.

**Faculty:** Elizabeth Edgerly, Ph.D., Chief Program Office, Alzheimer’s Association of Northern California and Northern Nevada

**Quality First:** 7 – Consumer-Friendly Information  
9 – Research and Education

## 8A MEMORY LOSS SUPPORT GROUPS

**Tuesday, May 8**

**2:15 p.m. – 4:15 p.m.**

- Learn about the benefits of support groups for individuals with memory loss in residential care settings.
- Gain skills to implement support groups for people with memory loss in assisted living and nursing homes.
- Explore challenges and opportunities for the residential care industry to provide more innovative services to people with dementia.

**Faculty:** Robyn Yale, Clinical Social Worker and Consultant, KJ Page, Administrator, Chaparral House, Kathryn Webb, Reminiscence Coordinator, Sunrise-Golden Gate Park

**Quality First:** 3 – Leading-Edge Care and Services  
7 – Consumer-Friendly Information

## 9A ARE YOU A CATALYST FOR CHANGE IN THE WAR ON HEALTHCARE COSTS?

**Tuesday, May 8**

**4:30 p.m. – 5:30 p.m.**

- Learn to utilize available resources to effectively manage long-term healthcare costs for your company.
- Discover how to use the Internet to become a more effective Human Resources professional.
- Discover how to use Internet resources to empower employee’s self-management of their healthcare.

**Faculty:** Chuck Kiskaden, Marketing and Sales and Gail Sullivan, Human Resources Consultant and Account Manager, Stone Tapert

**Quality First:** 6 – Human Resources Development

## 10A CONTINUING CARE AT HOME: HAS IT COME OF AGE?

**Tuesday, May 8**

**4:30 p.m. – 5:30 p.m.**

- Identify the benefits of continuing care at home and the legal issues it raises.
- Review delivery models available under current law.
- Discuss possible legislation designed to overcome any regulatory obstacles.

**Faculty:** Pamela Kaufmann, Partner, Hanson, Bridgett, Marcus, Vlahos & Rudy, LLP

**Quality First:** 5 – Continuous Quality Improvement  
7 – Consumer-Friendly Information

### 11A I MEASURED SATISFACTION, NOW WHAT DO I DO?

**Tuesday, May 8**

**4:30 p.m. – 5:30 p.m.**

- Understand the information presented on a typical satisfaction survey and how the benchmarks can be used to focus QI efforts.
- Learn about segmentation analysis and how it can be used to further refine the QI plan.
- Discover how to link satisfaction information with internal performance measures.

**Faculty:** Harold Urman, Partner, Vital Research, LLP

**Quality First:** 5 – Continuous Quality Improvement

### 12A CONSIDERING COMPENSATION: MOVING BEYOND MONEY

**Tuesday, May 8**

**4:30 p.m. – 5:30 p.m.**

- Explore creative approaches to compensation including salaries, benefits, perks and values.
- Review methods for attracting executive talent as well as frontline staff.
- Learn how to move the discussion away from salary alone.

**Faculty:** Jeffrey Harris, President, Druthers Agency, Inc.

**Quality First:** 6 – Human Resources Development

### 13A CHANGING CULTURES FROM MANAGING SERVICES TO MANAGING EXPERIENCES

**Wednesday, May 9**

**10:30 a.m. – 11:30 a.m.**

- Learn the importance of using a reliable, valid expectation survey that can be benchmarked against the industry standards.
- Learn how an organization can incorporate survey results into performance improvements and an effective rewards and recognition program for the organization.
- Learn how to change a satisfaction-based service culture to one exceeding a client's expectations.

**Faculty:** William Nowell, ServiceTrac, LLC

**Quality First:** 5 – Continuous Quality Improvement  
7 – Consumer-Friendly Information

### 14A GETTING THE MOST FROM YOUR CONSTRUCTION DOLLAR

**Wednesday, May 9**

**10:30 a.m. – 11:30 a.m.**

- Learn how to prepare comprehensive budgets for renovation and new construction projects.
- Examine the components that make up a construction project budget, including both soft and hard costs, value engineering, competitive bidding and negotiating contracts.
- Understand how construction costs are estimated and how they can be affected by value engineering.

**Faculty:** Stuart Stoller, Senior Associate, SGPA Architecture and Planning, Mark Zaleski, Senior Estimator, Cahill Contractors, Inc.

**Quality First:** 7 – Consumer-Friendly Information

### 15A RESIDENTS' CHARITABLE BEQUESTS: CAN THEY HOLD UP IN COURT?

**Wednesday, May 9**

**1:30 p.m. – 3:30 p.m.**

- Understand testamentary capacity, undue influence, and special rules addressing bequests to caregivers.
- Gain practical advice to avoid or defend against a will contest when you are named as a beneficiary.
- Protect your residents against undue influence and financial abuse in the estate planning process.

**Faculty:** David Baer, Civil Litigator, Michael McNaughton, Partner and S. Anne Johnson, Senior Counsel, Hanson, Bridgett, Marcus, Vlahos & Rudy, LLP

**Quality First:** 7 – Consumer-Friendly Information



## 16A MORE TIME, MORE JOY: TIME MANAGEMENT AND WORK/LIFE BALANCE FOR PROFESSIONAL WOMEN

**Wednesday, May 9**

**1:30 p.m. – 3:30 p.m.**

- Learn strategies for letting go of ineffective behaviors and thoughts in order to improve the management of time and balance between work and home.
- Learn how to effectively organize and manage time.

**Faculty:** Beth Goodman, Life Coach, BG Life-Coaching for Women

**Quality First:** 6 – Human Resource Development  
7 – Consumer-Friendly Information

## 18B FINANCIAL RISK MANAGEMENT POLICY: SHOULD YOUR ORGANIZATION HAVE ONE?

**Wednesday, May 9**

**10:30 a.m. – 11:30 a.m.**

- Learn about a Financial Risk Management Policy (FRMP) and why an organization needs one?
- Discover how an organization can create, implement and monitor a FRMP.
- Learn the primary components that are included/discussed in a customized FRMP.

**Faculty:** John Kautz, Managing Director and Group Head, Ziegler Capital Markets Risk Management & Advisory Group

**Quality First:** 2 – Governance Accountability

## 19B CLOSING A CCRC: WHAT YOU SHOULD KNOW ABOUT THE PROCESS

**Wednesday, May 9**

**1:30 p.m. – 3:30 p.m.**

- Learn the steps that must be taken in order to close a CCRC.
- Hear an account of how a closure actually worked, including the unexpected twists and hidden pitfalls in the process.
- Question provider representatives and consultants who worked together on the project about what they learned as a result of their experience.

**Faculty:** Allan Jergesen, Partner, Hanson, Bridgett, Marcus, Vlahos & Rudy, LLP, Mary McMullin, Principal, New Life Management & Development, William Platt, CEO, California P.E.O. Home

**Quality First:** 2 – Governance Accountability  
10 – Public Trust and Consumer Confidence

## BOARD AND TRUSTEE

### 17B ACCESSING WALL STREET CAPITAL FOR IMPLEMENTING CAMPUS DIVERSIFICATION

**Wednesday, May 9**

**10:30 a.m. – 11:30 a.m.**

- Understand how antiquated rental senior housing projects can be fully renovated and expanded for moderate to middle income seniors without additional debt through the sale of Low Income Tax Credits and other public/private equity sources.
- Learn how the dramatic increase in senior living property valuations provides a unique opportunity for nonprofits.
- Learn of new seed capital sources available from Wall Street in both tax-exempt and conventional lending forms.

**Faculty:** William Pomeranz, Senior Vice President, Cain Brothers, Jill Sorenson, Executive Director, Casa de las Campanas

**Quality First:** 2 – Governance Accountability

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## EDUCATIONAL SESSION PLANNER

	<b>Tuesday, May 8 10:30 a.m. - 11:30 a.m.</b>	<b>Tuesday, May 8 2:15 p.m. - 4:15 p.m.</b>	<b>Tuesday, May 8 4:30 p.m. - 5:30 p.m.</b>
<b>ALL</b>	<b>1A</b> WELLNESS WITHOUT WALLS <b>2A</b> MARKETING MIRACLE "THE BAKERSFIELD VIEW" <b>3A</b> DISCOVER THE MEANING OF LIFE IN JUST ONE HOUR <b>4A</b> PROBLEM GAMBLING AND OLDER ADULTS	<b>5A</b> UNDERSTANDING AND PREVENTING HARRASSMENT IN THE WORKPLACE <b>6A</b> CORPORATE STRUCTURING FOR THE FUTURE <b>7A</b> THE SCIENCE BEHIND MAINTAIN YOUR BRAIN <b>8A</b> MEMORY LOSS SUPPORT GROUPS	<b>9A</b> ARE YOU A CATALYST FOR CHANGE IN THE WAR ON HEALTHCARE COSTS? <b>10A</b> CONTINUING CARE AT HOME: HAS IT COME OF AGE? <b>11A</b> I MEASURED SATISFACTION, NOW WHAT DO I DO? <b>12A</b> CONSIDERING COMPENSATION MOVING BEYOND MONEY
<b>BOARD AND TRUSTEE</b>			
<b>SKILLED NURSING</b>	<b>21C</b> DISCLOSURE OF UNANTICIPATED OUTCOMES <b>22C</b> TREATMENT OF OBESE PATIENTS IN SKILLED NURSING FACILITIES	<b>23C</b> ABUSE AND UNUSUAL OCCURRENCE REPORTING IN SNFS <b>24C</b> ARE YOU UP WITH 2006 REGULATIONS YET – READY FOR 2007?	<b>25C</b> RISK IMPLEMENTATIONS OF PAIN MANAGEMENT <b>26C</b> NURSING AND REHAB: SUPPORTIVE DOCUMENTATION SOLUTIONS
<b>HOUSING</b>	<b>31D</b> A SUCCESSFUL MODEL OF CO-LOCATING AFFORDABLE SENIOR HOUSING AND SERVICES <b>32D</b> EVICTIONS – THE DARK SIDE OF PROPERTY MANAGEMENT	<b>33D</b> HONORING THE CULTURAL DIVERSITY OF OUR RESIDENTS <b>34D</b> DEALING WITH VIOLENT CRIME IN SENIOR HOUSING	<b>35D</b> DISASTER PLANNING FOR SENIOR HOUSING <b>36D</b> PERFORMANCE BENCHMARKS UPDATES – BETHANY CENTER
<b>SNF/RCFE</b>	<b>40E</b> TOP 10 AREAS OF OCCUPATIONAL FRAUD & ABUSE <b>41E</b> CCAC NEW DIRECTIONS – NEW STANDARDS	<b>42E</b> CREATING EFFECTIVE SYSTEMS TO MANAGE WANDERING BEHAVIOR AND PREVENT ELOPMENT	<b>43E</b> TAKING ADVANTAGE OF ONLINE TRAINING FOR CLINICAL STAFF AND MORE <b>44E</b> LAUGHTER IS THE BEST MEDICINE
<b>CCRC/MLRC</b>	<b>46F</b> JUST DO IT! GETTING STARTED WITH YOUR FUTURE <b>47F</b> CARVER MODEL – PART II	<b>48F</b> DOES NONPROFIT CONSTITUENCY ORIENTED CCRC DEVELOPMENT STILL WORK? <b>49F</b> FAMILY DYNAMICS: A SOCIAL AND LEGAL FRAMEWORK FOR MANAGING RELATIONSHIPS WITH DIFFICULT FAMILY MEMBERS <b>50F</b> KNOW WHEN TO HOLD 'EM, KNOW WHEN TO FOLD 'EM	<b>51F</b> PAINTING THE PICTURE: USING MULTI-MEDIA TO EFFECTIVELY MARKET A BLUE SKY RETIREMENT COMMUNITY <b>52F</b> RE-VISIONING: DEFINING A NEW PARADIGM FOR RETIREMENT



## EDUCATIONAL SESSION PLANNER

Wednesday, May 9 10:30 a.m. - 11:30 a.m.	Wednesday, May 9 1:30 p.m. - 3:30 p.m.	Wednesday, May 9 3:45 p.m. - 4:45 p.m.	
<b>13A</b> CHANGING CULTURES FROM MANAGING SERVICES TO MANAGING EXPERIENCES  <b>14A</b> GETTING THE MOST FROM YOUR CONSTRUCTION DOLLAR	<b>15A</b> RESIDENTS' CHARITABLE REQUESTS: CAN THEY HOLD UP IN COURT?  <b>16A</b> MORE TIME, MORE JOY: TIME MANAGEMENT AND WORK/LIFE BALANCE FOR PROFESSIONAL WOMEN		<b>ALL</b>
<b>17B</b> ACCESSING WALL STREET CAPITAL FOR IMPLEMENTING CAMPUS DIVERSIFICATION  <b>18B</b> FINANCIAL RISK MANAGEMENT POLICY: SHOULD YOUR ORGANIZATION HAVE ONE?	<b>19B</b> CLOSING A CCRC – WHAT YOU KNOW ABOUT THE PROCESS  <b>20B</b> FUND-RAISING SUCCESS THROUGH THE AAHSA PHILANTHROPY NETWORK		<b>BOARD AND TRUSTEE</b>
<b>27C</b> CULTURAL CHANGE IN TRANSITIONAL CARE  <b>28C</b> THE POSITIVES OF AROMATHERAPY	<b>29C</b> TURN A 'WANNA-BE' INTO A MOVER AND SHAKER  <b>30C</b> BEYOND COMPLIANCE – DEMENTIA TRAINING THAT CHANGES YOUR ORGANIZATION FROM THE BOTTOM UP		<b>SKILLED NURSING</b>
<b>37D</b> MISSION CREEK COMMUNITY PROJECT  <b>38D</b> BED BUGS – VERMIN IN HOUSING	<b>39D</b> HOW TO MAINTAIN YOUR FOCUS IN DISTRACTING ENVIRONMENTS	<b>CLOSING GENERAL SESSION</b>  <b>EVERYONE IS MULTICULTURAL: BRIDGING CULTURAL INFLUENCES FOR LEADERSHIP SUCCESS</b>	<b>HOUSING</b>
	<b>45E</b> THERAPY CAPS, OUTCOMES AND RUGS REFINEMENT		<b>SNF/RCFE</b>
<b>53F</b> IMPORTANCE OF RESEARCH WHEN ANALYZING YOUR MARKET  <b>54F</b> WHILE YOU WERE SLEEPING: NEW MODELS FOR SENIOR LIVING	<b>55F</b> FINANCIAL RISK OF VARIOUS ENTRANCE/MAINTENANCE MODELS  <b>56F</b> ENVISIONING THE FUTURE: PURPLE HAZE REVISITED?		<b>CCRC/MLRC</b>

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(Jewish Home of San Francisco Project)



*The undersigned served as Sole Manager in the  
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ABAG FINANCE AUTHORITY FOR  
NONPROFIT CORPORATIONS  
Revenue Refunding Bonds, Series 2005  
(Eskaton Properties, Incorporated)  
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*The undersigned served as Structuring and Bidding Agent on  
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dba/ Shell Point Village.*

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### 20B FUND-RAISING SUCCESS THROUGH THE AAHSA PHILANTHROPY NETWORK

**Wednesday, May 9**

**1:30 p.m. – 3:30 p.m.**

- Learn about the unique aspects of retirement housing philanthropy, including updates on the APN White Papers.
- Discover what has worked for other stand-alone and multi-site retirement organizations in raising funds.
- Learn about the most advantageous development strategies for getting started and increasing gifts over time.

**Faculty:** Leonard Kelly, Vice President, Foundation, American Baptist Homes of the West, William McMorran, Senior Partner, Green Oaks Consulting

**Quality First:** 2 – Governance Accountability

### 22C TREATMENT OF OBESE PATIENTS IN SKILLED NURSING FACILITIES

**Tuesday, May 8**

**10:30 a.m. – 11:30 a.m.**

- Gain an understanding of the clinical characteristics of obese patients.
- Learn the operational impacts of caring for obese patients in the skilled nursing facility setting.
- Develop strategies for mitigating risk and enhancing skill in caring for obese patients.

**Faculty:** Christopher Cherney, Assistant Administrator, Kaiser Permanente Post-Acute Care Center

**Quality First:** 5 – Continuous Quality Improvement

### 23C ABUSE AND UNUSUAL OCCURRENCE REPORTING IN SKILLED NURSING FACILITIES

**Tuesday, May 8**

**2:15 p.m. – 4:15 p.m.**

- Understand the definition of abuse and unusual occurrence.
- Learn what investigation you should conduct in order to determine whether an alleged abuse or unusual occurrence is reportable.

**Faculty:** James Napoli, Partner, Hanson, Bridgett, Marcus, Vlahos & Rudy, LLP

**Quality First:** 7 – Consumer-Friendly Information

### 24C ARE YOU UP WITH THE 2006 REGULATIONS YET? READY FOR 2007?

**Tuesday, May 8**

**2:15 p.m. – 4:15 p.m.**

- Closely examine three of the new survey guidelines published in 2006.
- Learn about the major changes made in the guidelines.
- Discover the major changes that will occur in 2007.

**Faculty:** Lori Costa, Clinical and Regulatory Consultant, Aging Services of California

**Quality First:** 7 – Consumer-Friendly Information

## SKILLED NURSING

### 21C DISCLOSURE OF UNANTICIPATED OUTCOMES

**Tuesday, May 8**

**10:30 a.m. – 11:30 a.m.**

- Learn the history of medical error and the history of disclosure programs in healthcare organizations.
- Identify the purpose of a disclosure program in nursing and skilled nursing facilities.
- Examine the components of a disclosure program and the process for disclosure of unanticipated events.

**Faculty:** Kelley Woodfin, Executive Director, LTC Risk Consulting

**Quality First:** 5 – Continuous Quality Improvement  
7 – Consumer-Friendly Information



## 25C RISK IMPLEMENTATIONS OF PAIN MANAGEMENT

**Tuesday, May 8**

**4:30 p.m. – 5:30 p.m.**

- Discuss the need for consistent and aggressive pain assessment and pain treatment in nursing facilities.
- Learn current theory on pain management and pain management protocols.
- Identify the components of a Pain Management Program.

**Faculty:** Kelley Woodfin, Executive Director, LTC Risk Consulting Services

**Quality First:** 3 – *Leading-Edge Care and Services*  
5 – *Continuous Quality Improvement*

## 26C NURSING AND REHAB: SUPPORT-IVE DOCUMENTATION SOLUTIONS

**Tuesday, May 8**

**4:30 p.m. – 5:30 p.m.**

- Discuss nursing vs. rehab terminology from the functional standpoint of the MDS self-performance score and its impact on medical records documentation/survey.
- Learn how to document in order to support rehab services in the areas of resident functional decline/improvement.
- Know how to document to support rehab services for residents who demonstrate high/low levels of function and/or who have cognitive deficits.

**Faculty:** Holly Spigner, Rehabilitation Specialist, Hallmark Rehabilitation

**Quality First:** 7 - *Consumer-Friendly Information*

## 27C CULTURAL CHANGE IN TRANSITIONAL CARE

**Wednesday, May 9**

**10:30 a.m. – 11:30 a.m.**

- Examine practical ways to move from an institutional model of care to a home-based model of care.
- Discuss the organizational structure when changing the model of care.
- Open discussion on positive ways to transition to a home-based model of care.

**Faculty:** Dr. Timothy Gieseke, President, California Association Long-Term Care Medicine

**Quality First:** 3 – *Leading-Edge Care and Services*  
5 - *Continuous Quality Improvement*

## 28C THE POSITIVES OF AROMATHERAPY

**Wednesday, May 9**

**10:30 a.m. – 11:30 a.m.**

- Understand the basic physiology of the sense of smell and aging olfactory sensory system.
- Recognize five essential oils safe and effective for use in various long-term care settings and appropriate reasons to use aromatherapy interventions.
- Identify effective and safe techniques for application of essential oils in various long-term care settings so a basic aromatherapy program can be implemented.

**Faculty:** KJ Page, Executive Director, Chaparral House

**Quality First:** 3 – *Leading-Edge Care and Services*  
9 – *Research and Education*

## 29C TURN A “WANNA-BE” INTO A “MOVER AND SHAKER”

**Wednesday, May 9**

**1:30 p.m. – 3:30 p.m.**

- Identify individual motivating factors by using a simple employee survey.
- Discuss how administration plays a vital role in employee improvement using employee motivating factors.
- Review performance outcomes when managers implement change driven by employee motivating factors.

**Faculty:** David Furnell, President & CEO and Joyce Waibel, Senior Vice President, Bristol Care, Inc.

**Quality First:** 6 – *Human Resources Development*

## EDUCATIONAL SESSIONS

### 30C BEYOND COMPLIANCE – DEMENTIA TRAINING THAT CHANGES YOUR ORGANIZATION FROM THE BOTTOM UP

**Wednesday, May 9**

**1:30 p.m. – 3:30 p.m.**

- Review a training curriculum that goes beyond meeting State regulations.
- Learn an innovative, hands-on approach to basic principles of dementia care.
- Leave with a toolbox of activities that help increase staff sensitivity and understanding of the dementia process.

**Faculty:** Linda Pacheco, Training and Development, Southern California Presbyterian Homes, Lisa Holland, Consultant

**Quality First:** 3 – Leading-Edge Care and Services  
5 – Continuous Quality Improvement

### 32D EVICTIONS – THE DARK SIDE OF PROPERTY MANAGEMENT

**Tuesday, May 8**

**10:30 a.m. – 11:30 a.m.**

- Using actual case studies learn the proper process to eviction without going to court.
- Discuss the proper steps to go through to legally evict residents.
- Learn how to establish good relationships with your legal team and community resources and mitigate damages.

**Faculty:** Mary Stompe, Executive Director and Eve Prevost, Manager of Property and Compliance, PEP Housing

**Quality First:** 7 – Consumer-Friendly Information

### 33D HONORING THE CULTURAL DIVER- SITY OF OUR RESIDENTS

**Tuesday, May 8**

**2:15 p.m. – 4:15 p.m.**

- Examine one's own cultural identity and how that identity impacts thoughts, values and behaviors.
- Understand the impact of immigration, generational differences and family dynamics with regard to residents.
- Focused attention on issues for Chinese senior residents.

**Faculty:** Claire Chow, Service Coordinator, Pleasanton Gardens and Kottinger Place

**Quality First:** 7 – Consumer-Friendly Information

### 34D DEALING WITH VIOLENT CRIME IN SENIOR HOUSING

**Tuesday, May 8**

**2:15 p.m. – 4:15 p.m.**

- Learn when a restraining order against residents or their family members for employees who have been threatened is needed.
- Discuss the responsibilities of the facility to protect staff and residents and what are the realistic limits.
- Examine the resident's rights when dealing with mental health issues.

**Faculty:** Allan Jergesen, Partner, Hanson, Bridgett, Marcus, Vlahos & Rudy, LLP, Martha Atwood, Board Member, Bethany Center Senior Housing, Inc.

**Quality First:** 7 – Consumer-Friendly Information

## HOUSING

### 31D A SUCCESSFUL MODEL OF CO- LOCATING AFFORDABLE SENIOR HOUSING AND SERVICES

**Tuesday, May 8**

**10:30 a.m. – 11:30 a.m.**

- Learn how the Centers for Elders Independence co-located with PACE senior services centers.
- Discover how sharing space can be a profitable model for both housing and services.
- Learn how this model has improved the day-to-day life for the residents in senior housing.

**Faculty:** Peter Szutu, President & CEO, Centers for Elder Independence

**Quality First:** 4 – Community Involvement  
8 – Consumer Participation

**35D DISASTER PLANNING  
FOR SENIOR HOUSING****Tuesday, May 8****4:30 p.m. – 5:30 p.m.**

- Learn how to prepare for an emergency from a large multi-organization's year-long research.
- Examine the process for preparing for an emergency.
- Discover how to develop a manual that fits your population.

**Faculty:** Jan Nunes, American Baptist Homes of the West**Quality First:** 4 – Community Involvement  
7 – Consumer-Friendly Information**36D PERFORMANCE BENCHMARKS UP-  
DATES – BETHANY CENTER****Tuesday, May 8****4:30 p.m. – 5:30 p.m.**

- Learn how to measure an organization's strategic progress toward goals and to continue to improve and ensure consistent measurement or results.
- Get the most out of benchmarking, which allows for objective, continuous monitoring and improvement.
- Discover the importance of sharing HUD's benchmarking goal data.

**Faculty:** Jerry Brown, Executive Director, Bethany Center, Janet Holland, Partner, Daoro, Zydel, Holland**Quality First:** 9 – Research and Education**37D MISSION CREEK COMMUNITY  
PROJECT****Wednesday, May 9****10:30 a.m. – 11:30 a.m.**

- Discuss the benefits of mixed-use senior housing.
- Learn about the issues of public vs. private use under one roof.
- Examine innovative affordable housing in an urban environment.

**Faculty:** Tom Brutting, HKIT Architects**Quality First:** 4 – Community Involvement**38D BED BUGS – VERMIN IN HOUSING****Wednesday, May 9****10:30 a.m. – 11:30 a.m.**

- Learn about the bed bug lifecycle and how it is transported.
- Discover how to detect bed bug infestation.
- Learn what you can do to control bed bug infestation in your facility.

**Faculty:** Herb Field, Urban Entomologist, Entomology Services**Quality First:** 7 – Consumer Friendly Information  
9 – Research and Education**39D HOW TO MAINTAIN YOUR FOCUS  
IN DISTRACTING ENVIRONMENTS****Wednesday, May 9****1:30 p.m. – 3:30 p.m.**

- Learn 25 great (and often overlooked) ways to manage time.
- Discover ways to keep a strong focus on care and service priorities.
- Learn simple ways to deal quickly with interruptions and distractions.

**Faculty:** Shari Peace, President, Peace Talks**Quality First:** 6 – Human Resources Development**SNF/RCFE****40E TOP 10 AREAS OF OCCUPATIONAL  
FRAUD AND ABUSE****Tuesday, May 8****10:30 a.m. – 11:30 a.m.**

- Examine the characteristics of fraudsters and why.
- Learn what the common fraud schemes are, and how they are detected.
- Discuss what you can do to deter and detect fraud in your organization.

**Faculty:** Gema Ptasinski, Partner and Tim Evans, Senior Manager, Vicenti, Lloyd & Stutzman, LLP**Quality First:** 6 – Human Resources Development

### 41E CCAC NEW DIRECTIONS – NEW STANDARDS

**Tuesday, May 8**

**10:30 a.m. – 11:30 a.m.**

- Discover the different standards for which accreditation is currently available to reflect the variety of programs that are offered by today's aging services organizations.
- Discuss the standards for programs such as adult day services, aging services networks, assisted living, continuing care retirement communities, person-centered long term care community nursing homes, dementia care programs and stroke specialty programs.
- Examine how these programs can be combined to maximize the value of accreditation for organizations offering programs and services to meet demand.

**Faculty:** Suzanne Matthiesen, Managing Director, CARF-CCAC and Aging Services

**Quality First:** 5 – Continuous Quality Improvement

### 42E CREATING EFFECTIVE SYSTEMS TO MANAGE WANDERING BEHAVIOR AND PREVENT ELOPEMENT

**Tuesday, May 8**

**2:15 p.m. – 4:15 p.m.**

- Understand the key factors that are essential for an elopement risk assessment (MDS data and RAP research) and describe how these integrate into individualized care plans.
- Identify key areas that require policy/procedures and staff training to maintain resident safety balanced against the individual rights of the residents.
- Examine strategies for a thorough investigation of incidences related to unsafe wandering/elopement.

**Faculty:** Jennifer Pettis, Policy Analyst and Consultant and Sandy Biggi, Senior Policy Analyst and Nurse Consultant, New York Association of Homes and Services for the Aging

**Quality First:** 3 – Leading-Edge Care and Services  
7 – Consumer-Friendly Information

### 43E TAKING ADVANTAGE OF ONLINE TRAINING FOR CLINICAL STAFF & MORE!

**Tuesday, May 8**

**4:30 p.m. – 5:30 p.m.**

- Determine if online training can be a viable education/training option for your organization.
- Learn how to develop and conduct the RFP (request for proposal) and implementation processes associated with deploying online training in a clinical/long term care environment.
- Hear from an online training provider on what to expect from an online training vendor.

**Faculty:** Leslie Warren, Vice President Employee Development, American Baptist Homes of the West, Laura More, President, Care2Learn

**Quality First:** 5 – Continuous Quality Improvement

### 44E LAUGHTER IS THE BEST MEDICINE

**Tuesday, May 8**

**4:30 p.m. – 5:30 p.m.**

- Hear about an “out of the box” life enhancing-wellness-focused program.
- Learn how to adapt a wellness exercise program in any location.
- Discover how to form a laughter club in a facility.

**Faculty:** Dr. Sebastien Gendry, Principal, School of Laughter Yoga

**Quality First:** 3 – Leading-Edge Care and Services

### 45E THERAPY CAPS, OUTCOMES AND RUGS REFINEMENT

**Wednesday, May 9**

**1:30 p.m. – 2:30 p.m.**

- Hear a brief history of Therapy Caps and the current version of Therapy Caps, including discussion of the exception process.
- Learn about the key documentation aspects that help to support exceptions to the Caps.
- Hear about potential future methods of payment for Part B Therapy services being explored by CMS.

**Faculty:** Geoffrey Morris, AEGIS Therapies

**Quality First:** 3 – Leading-Edge Care and Services



## CCRC/MLRC

**46F JUST DO IT! GETTING STARTED WITH YOUR FUTURE****Tuesday, May 8****10:30 a.m. – 11:30 a.m.**

- Examine the step-by-step process of getting started with a strategic plan for securing the long-term mission of an organization through the development of a CCRC.
- Using a case study learn the key components of the development process – the vision, the financial plan the development management.
- Learn how development management facilitated the implementation of the strategic plan.

**Faculty:** Cheryl Wilson, President & CEO and Ed Thomson, Chief Financial Officer, St. Paul's Senior Homes and Services, K. Stanley Sokolove, President, Sokolove Development

**Quality First:** 2 – Governance Accountability

**47F CARVER MODEL – PART II****Tuesday, May 8****10:30 a.m. – 11:30 a.m.**

- Examine new ways to increase management accountability to the board while shifting the board away from operational issues even in the age of SORBOX.
- Learn how two Aging Services of California organizations have created a new balance for their Boards and their CEOs through implementing the Carver Policy Model.
- Define who really owns your nonprofit entity and see examples of written policies for both board behavior and the interaction of directors with the CEO.

**Faculty:** David Ferguson, President & CEO and Randy Stamper, Board President, American Baptist Homes of the West, Todd Murch, President & CEO and Bill Mason, Board President, Eskaton

**Quality First:** Governance Accountability

**48F DOES NONPROFIT CONSTITUENCY ORIENTED CCRC DEVELOPMENT STILL WORK?****Tuesday, May 8****2:15 p.m. – 4:15 p.m.**

- Learn how constituency support can expedite the often expensive and cumbersome land use process.
- Discover how constituency targeting can expedite the presale/marketing process.
- See how new developments can energize an organization and further its historic care mission and be accomplished through the raising of public/private seed capital.

**Faculty:** William Pomeranz, Senior Vice President, Cain Brothers, Daniel Ruth, CEO, Jewish Home San Francisco, Debi Stebbins, Chief Executive, Masonic Homes of California

**Quality First:** 2 – Governance Accountability

**49F FAMILY DYNAMICS: A SOCIAL AND LEGAL FRAMEWORK FOR MANAGING RELATIONSHIPS WITH DIFFICULT FAMILY MEMBERS****Tuesday, May 8****2:15 p.m. – 4:15 p.m.**

- Understand what drives the behavior of difficult family members.
- Learn strategies for defusing problems with difficult families.
- Understand the legal dos and don'ts of communicating with residents' families.

**Faculty:** Glenda Zarbock, Partner, Hanson, Bridgett, Marcus, Vlahos & Rudy LLP, Sarah Goldman, Director, Social Services, The Peninsula Regent

**Quality First:** 4 – Community Involvement  
8 – Consumer Participation

### 50F KNOW WHEN TO HOLD 'EM, KNOW WHEN TO FOLD 'EM

**Tuesday, May 8**

**2:15 p.m. – 4:15 p.m.**

- Identify strategies that have allowed one organization to continue to serve those of modest means while still growing the overall portfolio.
- Hear about consumer data and trends based on survey data from California consumers, and how they have served the planning and decision processes.
- Identify strategies that worked, and those that didn't work or that resulted in other challenges along the way.

**Faculty:** Marty Tamburrano, President, Episcopal Home Communities, Maria Dwight, President and Karen Adams, Vice President, Gerontological Services, Inc., James Graunke, Executive Director, Scripps Home and VP Operations, Episcopal Homes Foundation

**Quality First:** 2 – Governance Accountability  
8 – Consumer Participation

### 51F PAINTING THE PICTURE: USING MULTI-MEDIA TO EFFECTIVELY MARKET A BLUE SKY RETIREMENT COMMUNITY

**Tuesday, May 8**

**4:30 p.m. – 5:30 p.m.**

- View examples of multi-media marketing tools.
- Learn practical steps to take in creating cost-effective multi-media tools.
- Explore ways in which multi-media tools can be used with prospects and referral sources.

**Faculty:** Nancy Carman, Consultant, New Life Management & Development, Inc.

**Quality First:** 8 – Consumer Participation

### 52F RE-VISIONING: DEFINING A NEW PARADIGM FOR RETIREMENT

**Tuesday, May 8**

**4:30 p.m. – 5:30 p.m.**

- Compare/contrast the CCRC as a physical environment with traditional neighborhoods.
- Explore how increasingly demanding retirement customers will shape future retirement environments.
- Consider ways the CCRC might adapt to serve an expanded market.

**Faculty:** Louis Anderson, Architect and Urbanist, Freeman White

**Quality First:** 8 – Consumer Participation

### 53F IMPORTANCE OF RESEARCH WHEN ANALYZING YOUR MARKET

**Wednesday, May 9**

**10:30 a.m. – 11:30 a.m.**

- Assess methods for determining input for strategic planning.
- Determine the need and scope for marketing research.
- Understand the elements of focus group research.

**Faculty:** Mary McMullin, Marketing Director and Sara Montalto, New Life Management & Development, Inc.

**Quality First:** 8 – Consumer Participation

### 54F WHILE YOU WERE SLEEPING: NEW MODELS FOR SENIOR LIVING

**Wednesday, May 9**

**10:30 a.m. – 11:30 a.m.**

- Understand national trends affecting senior communities.
- Learn how to relate national trends to market expectations in California.
- Using case studies, gain an understanding of how other communities are navigating these changes.

**Faculty:** J. David Hoglund, Principal and Director and Arch Pelley, Senior Associate, Perkins Eastman, Kevin Gerber, President & CEO Episcopal Homes Foundation

**Quality First:** 4 – Community Involvement  
8 – Consumer Participation

## **55F FINANCIAL RISK OF VARIOUS ENTRANCE/MAINTENANCE MODELS**

**Wednesday, May 9**

**1:30 p.m. – 3:30 p.m.**

- Review the array of entrance fee contracts and service packages offered in today's market, both nationally and within California.
- Learn the advantages and disadvantages of various pricing models for nonprofit owners.
- Through real case study examples, gain insights into how you might change or refine your pricing model for your financial benefit and to attract a broader array of prospective residents.

**Faculty:** Mary Munoz, Managing Director, Ziegler Capital Markets Group, Brian Schiff, Senior Vice President, Planning and Development, Greystone Communities, Molly Forrest, CEO, Los Angeles Jewish Homes for the Aging, Grancell Village

**Quality First:** 2 – Governance Accountability

## **56F ENVISIONING THE FUTURE: PURPLE HAZE REVISITED?**

**Wednesday, May 9**

**1:30 p.m. – 3:30 p.m.**

- Identify key elements that could affect the future of our services.
- Develop practical as well as creative responses to emerging trends.
- Interact with fellow audience members in a fast-paced show-and-tell workshop.

**Faculty:** Daniel Cinelli, Managing Principal, Perkins Eastman, Karen Adams, Vice President, Gerontological Services, Inc.,

**Quality First:** 2 – Governance Accountability

## **Closing Keynote Session**

### **EVERYONE IS MULTICULTURAL: BRIDGING CULTURAL INFLUENCES FOR LEADERSHIP SUCCESS**

**Wednesday, May 9**

**3:45 – 4:45 pm**

Designed to help organizational leaders, leadership candidates, and the general public gain new insight and direction into the current workplace diversity agenda. Everyone that is Multicultural can help anyone gain an appreciation for themselves and others and learn what it takes to succeed in the business world today. It's the perfect guide for individuals of all cultural influences who want to improve performance, workplace relationships, and diversity initiatives.

**During this session you will:**

- Identify cultural influences and manage stereotypes.
- Learn how to gain corporate comfort and improve culturally diverse relationships.
- Discover three steps to cultural competency and the values of redefining diversity.

**Faculty:** Dr. Pamela Johnson, Author, *Everyone Is Multicultural: Bridging Cultural Influences for Leadership Success*

**Quality First:** 1 – AAHSA's Covenant  
6 – Human Resources Development

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is an  
*active*  
**verb™**

**ag-ing** v. **1** To grow and mature,  
**2** to experience life  
(as in “We all are aging; some with  
more experience than others.”)

How will you define aging?  
Do you know the many choices you have  
to help ensure your aging experience is  
healthy, safe, independent and active?

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**[www.aging.org](http://www.aging.org)**

Proceeds from the Golf Tournament and Silent Auction benefit Aging Services' Scholarship Program. Since the program's inception in 2001, over \$37,000 in educational scholarships have been distributed to members in need. Through your generous support, and the support of others like you, we hope to continue building upon this success.

### **Golf Tournament**

Sign up now for the 6<sup>th</sup> Annual Golf Tournament, Monday, May 7 at 8 a.m. This year we will be playing at Rancho Cañada Golf Club in Carmel Valley. When you want a day away from it all with an opportunity to challenge your golf skills, there is no destination more rewarding. Players of all levels welcome! The cost is \$190, which includes: green fees, cart, range balls, bottled water, continental breakfast, snacks, raffle, and a post tournament BBQ lunch. Aging Services would like to thank **Morrison Senior Dining** for this year's tournament sponsorship.

The tournament also will offer lots of prizes: M/W longest drive, M/W closest to the pin, longest putt, putting contest and more! You can't win if you don't play, so sign up today! And don't forget the raffle. Tickets will be sold separately onsite for chances to win even more great prizes!

### **"Packet of Perks"**

Golfers, for just \$30 you can preorder your "Packet of Perks." This package includes: Two free mulligans, two beverage coupons, putting contest entry, and \$5 to use in the pro-shop.

### **Silent Auction**

A fun-filled Silent Auction will be held during Aging Services' 46<sup>th</sup> Annual Conference, May 8-9, 2007 in Monterey, California. Come bid on some fantastic weekend getaways, hotel stays, handcrafted items and much, much more! Donations are still needed, so if you are interested in supporting this worthy cause please contact Hilary Holland at 916.932.1265 or hholland@aging.org.

### **Annual Meeting Scholarships Available**

Scholarships are available to attend Aging Services Annual Conference. The following members are eligible to apply: employees, residents and trustees of voting members, graduate student members pursuing a career in aging services, and individuals sponsored by an Aging Services member. Funding is based on financial need and is limited to one scholarship per facility every other fiscal year (July 1-June 30). Applicants may request assistance with registration, travel and lodging expenses. Applications are available on Aging Services' website at [www.aging.org](http://www.aging.org). To be considered, completed forms must be received by March 30, 2007. For more information, please contact Hilary Holland at the Aging Services office.

## **Aging Services of California's 6<sup>th</sup> Annual Scholarship Fund Golf Tourney Entry Form**

**Aging Services' members and exhibitors**

**are welcome. Bring your favorite golf foursome!**

- ☐ I will be golfing and need to be placed on a team.
- ☐ I will be golfing and have a foursome.
- ☐ Contact me for sponsorship/prize donation information.

#### **Player 1:**

Name: \_\_\_\_\_

Company: \_\_\_\_\_

Address: \_\_\_\_\_

Phone: \_\_\_\_\_

Handicap, Index or Last Score: \_\_\_\_\_

#### **Player 2:**

Name: \_\_\_\_\_

Company: \_\_\_\_\_

Address: \_\_\_\_\_

Phone: \_\_\_\_\_

Handicap, Index or Last Score: \_\_\_\_\_

#### **Player 3:**

Name: \_\_\_\_\_

Company: \_\_\_\_\_

Address: \_\_\_\_\_

Phone: \_\_\_\_\_

Handicap, Index or Last Score: \_\_\_\_\_

#### **Player 4:**

Name: \_\_\_\_\_

Company: \_\_\_\_\_

Address: \_\_\_\_\_

Phone: \_\_\_\_\_

Handicap, Index or Last Score: \_\_\_\_\_

#### **Payment Information:**

Tourney Entry Fee: \$190 x \$ \_\_\_\_\_  
(includes BBQ)

Packet of Perks: \$30 x \$ \_\_\_\_\_

**Grand Total:** \$ \_\_\_\_\_

☐ VISA ☐ MasterCard ☐ AMEX ☐ Check is enclosed

Credit Card#: \_\_\_\_\_

Exp. Date: \_\_\_\_\_

Signature: \_\_\_\_\_

#### **Please mail or fax to:**

Aging Services of California  
1315 I St, Ste 100 • Sacramento, CA 95814  
916-932-1265 • Fax 916-428-4250



# REGISTRATION FORM

- Separate Forms - A separate form is required for each attendee. Photocopies are acceptable. Please copy completed form(s) for your records.
- Group Discounts - All group discount registration forms must be submitted together by the **Early-Bird Deadline of April 6, 2007.**

Full Name: \_\_\_\_\_ First Name for Badge: \_\_\_\_\_  
 Title: \_\_\_\_\_ ☐ Trustee ☐ Resident ☐ Student ☐ Speaker  
 Company/Facility Name: \_\_\_\_\_  
 Address: \_\_\_\_\_ City/State/Zip: \_\_\_\_\_  
 Phone: \_\_\_\_\_ Fax: \_\_\_\_\_ E-mail: \_\_\_\_\_  
 NHAP, RCFE and /or BRN Lic. #: \_\_\_\_\_ Birthdate: (for RCFE) \_\_\_\_\_  
 Check if appropriate: ☐ First-time Attendee ☐ Vegetarian ☐ I'll be a moderator.  
 In the event of an emergency, contact (list name and phone number): \_\_\_\_\_

Circle appropriate cost for each choice and note amount in space at right. Total all entries at bottom. No discounts apply, other than those shown.

Circle appropriate cost for each choice and note amount in space at right. Total all entries at bottom. No discounts apply, other than those shown.	MEMBER REGISTRATION				TRUSTEES	RESIDENTS & STUDENTS	NON-MEMBERS	TOTAL CHARGES
	GROUP DISCOUNT BY APRIL 6	BY APRIL 6	APRIL 7-20	AFTER APRIL 20				
<b>PRE-CONFERENCE</b> <i>(Includes workshop and lunch)</i>								
<b>Monday, May 7, 2007</b>								
<input type="checkbox"/> Pre-Con 1	Leadership Development II	\$165	\$165	\$165	\$165	\$165	\$275	
<input type="checkbox"/> Pre-Con 2	Cultural Change	\$145	\$160	\$175	\$125	\$100	\$275	
<input type="checkbox"/> Pre-Con 3	Management and Occupancy Review	\$72	\$80	\$87	\$62	\$50	\$137	
<input type="checkbox"/> Pre-Con 4	Budget Submission and Rent Increases	\$72	\$80	\$87	\$62	\$50	\$137	
<input type="checkbox"/> Pre-Con 5	Aging and Cognition	\$145	\$160	\$175	\$125	\$100	\$275	

## ANNUAL MEETING EDUCATION

May 8-9, 2007

Full Conference Package **\$435** \$490 \$555 \$628 \$370 \$185 \$720 \$ \_\_\_\_\_  
 (includes all events except pre-cons)

## ONE-DAY EDUCATION

☐ Tuesday, May 8 ☐ Wednesday, May 9 **\$275** \$300 \$330 \$360 \$205 \$125 \$460 \$ \_\_\_\_\_  
 (evening social events not included)

## EXTRA TICKETS

☐ Tuesday Lunch and Exhibit Hall \$55  
☐ Tuesday Social Event – Historical Monterey Gardens \$95  
☐ Wednesday Breakfast and Exhibit Hall \$40  
☐ Wednesday Business Meeting and Luncheon \$55  
☐ Wednesday Evening Awards Gala \$55

## FAMILY AND FRIENDS REGISTRATION (meals only)

Name(s): \_\_\_\_\_ \$250 \$ \_\_\_\_\_

## SILVER STAR ATTENDEE

Will be honored at Wednesday's Business Meeting Luncheon. Name of Honoree: \_\_\_\_\_

Fee is \$50. Deadline to register Silver Stars is April 6. \_\_\_\_\_ Title: \_\_\_\_\_ Year hired: \_\_\_\_\_

**Registration Deadline: May 1, 2007; thereafter, register on-site.**

## QUESTIONS:

Call Maricel Lumaquin – 916-932-1271 or E-mail – mlumaquin@aging.org

☐ Check here if you require any of the auxiliary aids or services identified in the Americans With Disabilities Act in order to attend this conference.

## PAYMENT METHOD

☐ VISA ☐ MasterCard ☐ AMEX ☐ Check is enclosed

Name on Credit Card: \_\_\_\_\_

Credit Card Account #: \_\_\_\_\_ Exp. Date: \_\_\_\_\_

Signature: \_\_\_\_\_ Amt. Auth.: \_\_\_\_\_

## Grand Total \$ \_\_\_\_\_

Registration forms received without payment will not be processed.

**Mail or Fax to:** Aging Services of California • 1315 I Street, Ste 100, Sacramento, CA 95814 • 916-392-5111 • Fax 916-428-4250

## Registration

**INTERNET** – register online at [www.aging.org](http://www.aging.org).

Payment is by credit card only.

**FAX** – 916-428-4250 - Fax registration forms if payment is made by credit card only. Do not mail the original form after faxing registrations.

**MAIL** - Mail your completed registration form(s) with payment to:

Aging Services of California  
1315 I Street, Suite 100  
Sacramento, CA 95814

## Hotel Information

In the heart of historic downtown Monterey, and surrounded by the attractions of the spectacular Monterey Peninsula, the Monterey Marriott provides an ideal location for business meetings.

Monterey Marriott  
350 Calle Principal  
Monterey, CA 93940  
(831) 647-4005

**Rate:** \$170 single/double **Note:** All rooms are non-smoking. There is a \$250 charge for smoking in rooms.

**Call Marriott Reservations** at 1-800-228-9290 or (831) 649-4234. Be sure to mention you are with Aging Services of California to receive the group rate.

**Reservation Deadline:** Monday, April 16, 2007

**Did you know?** Associations are held financially responsible for hotel rooms reserved but not actually occupied. To save Aging Services from penalty fees, and to ensure that all attendees receive accommodations, we ask that you reserve hotel rooms realistically. If you must cancel, please do so with as much notice as possible. Canceling fewer than five business days in advance of your arrival does not allow ample time for your room to be re-sold, and often means that Aging Services will pay for your unoccupied hotel room.

## Parking

- Valet parking is available at \$17/day.
- Public parking facilities are available nearby. Contact hotel for more information.

## On-Site Registration

Pick up your registration on-site at the Monterey Marriott Hotel during these registration hours:

Monday, May 7: 7:30 a.m. – 5:00 p.m.  
Tuesday, May 8: 7:00 a.m. – 5:30 p.m.  
Wednesday, May 9: 7:00 a.m. – 5:00 p.m.

## Group Discount

Any combination of full conference and one-day registrations will qualify. The group discount provides 10% OFF when 11 or more people from the same corporation or three or more people from the same facility register together. The discount does not apply to pre-conference sessions, or extra tickets. Group registrations must be submitted together and must be postmarked by April 6, 2007. The registration form lists the discounted amounts for easy calculation.

## Trustee, Resident and Student

Trustees, residents, students and government staff may attend Aging Services of California Annual Conference at special registration rates. College students must provide a copy of current student identification card when registering. See registration form for specific rates.

## Your Comfort Is Our Concern

Staff does their best to provide a comfortable climate for the meeting; however, sometimes it is warmer or cooler than you prefer. Please layer your clothing to give you options. In consideration of attendees with allergies, please limit perfume and cologne. Also, we ask everyone to please turn off cellular phones and beepers during sessions.

## Special Needs

Do you have special needs (i.e. physical, dietary, etc.) that we can address to make your participation more enjoyable? Please check the appropriate box on the registration form and/or contact the Education & Events Management Department at (916) 392-5111.

## Attire

Dress is business casual except for the special events. Tuesday evening's social event is casual. The Wednesday night Premiere is business dressy.

## No Smoking Policy

There is no smoking allowed in any of the indoor events associated with this meeting.

## Non-Member Vendors

Employees of companies who are neither Aging Services associate members nor annual conference exhibitors may not participate nor purchase tickets for any event associated with the Aging Services of California Annual Conference including: Golf Tournament, Exhibit Hall, Social Event, Business Meeting and Luncheon and Premiere. Should an associate member or exhibitor prospect express interest in previewing an event during the Annual Conference, prior arrangements must be made with Aging Services, and a Aging Services staff member must accompany the individual(s) during a brief tour.

## Cancellation Policy

No refunds will be given to those who register but do not attend the Conference. All cancellations must be made in writing. Telephone cancellations must be followed by a written request.

Received by April 6	Full refund
Received by April 9-20	50% refund
Received after April 20	No refund

The planners and sponsors of this event reserve the right to substitute speakers without penalty due to unforeseen and/or unavoidable circumstances.



Paul Gordon



Pamela Kaufmann

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