



# PEAK

LEADERSHIP SUMMIT

March 19–22, 2017 | Washington, DC

**EXECUTIVES AT THE  
FOREFRONT OF AGING SERVICES**



# AMAZING WHAT YOU CAN SEE FROM THE SUMMIT

**Broaden your perspective and expand your thinking at the preeminent leadership forum for top-tier executives in the aging services field.**

The PEAK Leadership Summit is your professional community's meeting place—where like minds and divergent thinkers come together to explore the strategies and best practices needed to respond with quality to the ever-changing needs of the aging population. Ask questions, address issues, tackle challenges, and harness the opportunities of a fast-growing field—all in four thought-provoking days of personal interaction and high-level idea exchange. Join the country's top aging services business leaders, experts, and advocates in Washington D.C., March 19 - 22, 2017.

**You'll be amazed at what you see from here.**

**PEAK**

LEADERSHIP SUMMIT

March 19–22, 2017 | Washington, DC

Marriott Wardman Park Hotel

**PINNACLE**

FOR LEADERSHIP TEAMS OF  
MULTISITE ORGANIZATIONS

March 19, 2017 | Washington, DC

# SCHEDULE AT-A-GLANCE

For a complete listing of session speakers, BaseCamp hosts, networking events and activities, visit [LeadingAge.org/PEAK](http://LeadingAge.org/PEAK).

## PINNACLE

*Designed exclusively for leadership teams of multisite provider organizations*  
ADDITIONAL REGISTRATION REQUIRED

### Sunday, March 19, 2017

- 11:30 a.m. Welcome & Networking Lunch
- 12:30 - 5:30 p.m. Keynote Presentation & Executive Workshop
- 6:00 p.m. Networking Reception & Dinner

## PEAK LEADERSHIP SUMMIT

### Sunday, March 19, 2017

- 8:30 a.m. - 12:30 p.m. Public Policy Congress
- 1:00 - 5:00 p.m. Workshops (P)

### Monday, March 20, 2017

- 6:00 - 7:00 a.m. Morning Exercise Activity
- 8:00 - 9:30 a.m. General Session
- 9:30 a.m. - 1:00 p.m. BaseCamp
- 1:00 - 4:30 p.m. Leadership Workshop (A)
- 1:00 - 2:30 p.m. Education Sessions (B)
- 3:00 - 4:30 p.m. Education Sessions (C)
- 4:30 - 5:30 p.m. BaseCamp Reception
- 6:00 p.m. Great Minds Gala Reception (TICKETS REQUIRED)
- 7:00 p.m. Great Minds Gala Dinner (TICKETS REQUIRED)

### Tuesday, March 21, 2017

- 8:00 - 9:30 a.m. Forums (D)
- 9:30 a.m. - 12:00 p.m. BaseCamp
- 12:00 - 3:30 p.m. Leadership Workshop (E)
- 12:00 - 1:30 p.m. Education Sessions (F)
- 2:00 - 3:30 p.m. Education Sessions (G)
- 4:00 - 5:30 p.m. Education Sessions (H)

### Wednesday, March 22, 2017

- 8:00 a.m. Lobby Day Breakfast
- 8:30 - 10:00 a.m. Capitol Hill Briefing & State Caucus
- 10:00 a.m. - 5:00 p.m. Group Hill Visits

# PEAK EDUCATION: LEARNING AT THE HIGH

**SUNDAY, MARCH 19**

**▲ 1:00 - 5:00 p.m.**

## Workshops (P)

### 40-P. AGEISM WORKSHOP: TAKING STEPS TOWARD A NEW VISION

As aging services professionals, we respect the wisdom and experience that comes with age. Yet, elders and their advocates encounter barriers daily. Like racism or sexism, ageism is evident in countless aspects of our lives. This half-day program will delve into the many ways ageism manifests itself in our work and how taking steps toward LeadingAge's aspirational vision, an America freed from ageism, will address rubber meets the road challenges of day-to-day operations.

- Consider why the shared experience of aging means we all have a vested interest in creating a society that respects individuals throughout their lifespan.
- Explore current research on ageism and common public perceptions of older adults.
- Discuss ways to reframe the way you think and communicate about aging.

**Tracey Gendron**, Associate Professor, Department of Gerontology, Virginia Commonwealth University; **Kirsten Jacobs**, Associate Director of Dementia & Wellness Education, LeadingAge; **Jennifer Nichols**, Senior Associate, Learning Team, FrameWorks Institute

### 41-P. PHILANTHROPY WORKSHOP: LEVERAGING DATA AND YOUR BOARD TO ACHIEVE FUNDRAISING SUCCESS

A critical factor in establishing a philanthropy program that ultimately proves successful is an active and engaged board of directors. However, establishing an organizational culture that understands the value of philanthropy can often be a challenge. One persuasive tool is data, but until now, there has not been a comprehensive look at the role of private giving in aging services.

- Hear about a groundbreaking effort to measure the nature and extent of giving in our field.
- Understand how to use data to make the case to your board that pursuing or expanding a philanthropy strategy can bring tremendous benefits to the organization and the seniors it serves.
- Explore the many ways you can work with your board to make significant philanthropic strides in your organization.

**Nathan Dietz**, Senior Research Associate, The Urban Institute; **Simone Joyaux**, Consultant, Joyaux Associates

EST LEVEL

# GENERAL SESSION

Monday, March 20

▲ 8:00 - 9:30 a.m.

## UNLEASH YOUR BEST WORK

Featuring Todd Henry



Channeling true passion for work into something that is useful to others has a profound impact on you, your organization and the community at large. Aging services leaders who enthusiastically put forth their best effort and ideas every day will inevitably make lasting, transformational contributions to the field. So often, however, that passion and drive give way to mediocrity and procrastination. Leaders find themselves bouncing from task to task and scrambling to make deadlines, never having time for the reflective and creative work that generates and propels great ideas forward.

Succumbing to common pitfalls prevents many of us from unleashing our best work, but that cycle can be broken. In his book *Die Empty*, **Todd Henry** provides tools to get unstuck by cultivating the mindset and methods needed to sustain enthusiasm and push through mental barriers.

*Following the General Session, attendees can also participate in an extended leadership workshop (1-A.) with Todd Henry.*

# PEAK EDUCATION: SESSIONS CONTINUED

## MONDAY, MARCH 20

▲ 8:00 - 9:30 a.m.

*General Session*

▲ 1:00 - 4:30 p.m.

*Leadership Workshop (A)*

### 1-A. FIND AND LEVERAGE YOUR PASSION

Many people stubbornly procrastinate taking action on their innovative initiatives, believing they will always have tomorrow. The cost of this inaction is great. How can aging services leaders push through mental barriers to approach their work with fierce curiosity? By focusing on identifying core personal, team and organizational passion areas and applying them to the work already underway.

- Discuss ways to spot and avoid the seven “deadly sins” that lead to mediocrity and stagnancy.
- Embrace a curious mindset and an orientation toward lifelong growth and skill development as core capacities of leaders who make valuable contributions to the world.
- Learn how to counter aimlessness by defining your goals wisely and building your life around achieving them.

**Todd Henry** is the author of *Die Empty*, a tool for people who aren’t willing to put off their most important work for another day. Henry works with leaders and organizations to help establish practices that lead to everyday brilliance.

▲ 1:00 - 2:30 p.m.

*Education Sessions (B)*

### 2-B. PLANNING AND MARKETING THE SENIOR LIVING COMMUNITY OF THE FUTURE

- Explore ways to proactively evaluate your organization’s current position in the market to determine the most promising opportunities to pursue in the future.
- Hear about one community’s aggressive repositioning efforts to align products and services with future market needs and expectations.
- Learn how to develop a strategic marketing plan that effectively meets the individualized needs of prospects.

### 3-B. 2016 BUSINESS STRATEGY COUNCIL: NAVIGATING TODAY'S AGING SERVICES ENVIRONMENT

- Hear how a group of LeadingAge members and corporate partners worked together to identify the major challenges facing our field.
- Discuss the council's year-long efforts to address issues related to workforce, growing the not-for-profit presence and mid-market housing.
- Learn about toolkits available to help you apply evidence-based solutions to pressing leadership and operational challenges.

### 4-B. HOW TO ENGAGE KEY STAKEHOLDERS TO ADVANCE CHANGE

- Learn how to cut through the obstacles that frustrate most leaders and make change stick.
- Understand the importance of engaging the right people, clarifying critical steps and prioritizing the right communications.
- Explore ways to effectively address the "people side" of change, including taking an inventory of your allies, resisters and undecideds.

### 5-B. SHARED CARE PLANNING AND COORDINATION TECHNOLOGIES: PROVIDER CASE STUDIES

- Explore the range of shared care planning and coordination technologies available for long-term and post-acute care settings.
- Consider the most important functions and features to look for when selecting a care planning and coordination technology solution.
- Discuss the lessons learned from providers who have implemented shared care planning and coordination technologies in their organization.

### 6-B. HUD MANAGEMENT UPDATE

- Discuss with a panel of HUD officials the hottest operational issues facing housing providers today.
- Get timely updates about HUD multifamily transformation, improvements planned for asset management oversight and the procurement for third party contract administrators.
- Hear about upcoming regulatory guidance and possible implications of recent releases.

**▲ 3:00 - 4:30 p.m.**

#### *Education Sessions (C)*

### 7-C. EMBRACE THE DISRUPTORS: TRENDS CHANGING THE FACE OF SENIOR LIVING

- Consider the confluence of external and internal forces that are increasingly disrupting business as usual.
- Gain insight into the impact of top ten disruptors for 2017 from a marketing, operations and design perspective.
- Hear how aging services providers are adapting to this new normal and leading senior living in new and divergent directions.

## PEAK EDUCATION: SESSIONS CONTINUED

### 8-C. FINDING INSPIRATION OUTSIDE AGING SERVICES: LEARNING FROM OTHER FIELDS

- Examine the parallels between aging services and the fields of people with disabilities, the arts and education.
- Consider what aging services providers might learn from the experiences of leaders in other disciplines.
- Explore ways to apply the lessons learned from professionals outside our field to your work with older adults.

### 9-C. GOVERNANCE FOR A CHANGING AGING SERVICES LANDSCAPE

- Weigh the implications for your governing board of today's shift toward a smaller board size, more diverse composition and increased outside scrutiny.
- Understand the board's essential role in fundraising efforts in light of growing competition for donors.
- Discuss ways to prepare your board to embrace emerging trends and weigh growth and change opportunities.

### 10-C. MANAGING REGULATORY CHANGE: WHAT'S HERE, WHAT'S COMING AND HOW TO PREPARE

- Consider what to expect from phase II and III of the CMS final rule provisions and what they mean for nursing home providers.
- Discuss how to address compliance, operations and clinical requirements.
- Identify critical areas for staff training and take home a variety of tools and resources to help your organization prepare for what is next.

### 11-C. EMPLOYMENT AND WORKFORCE CONCERNS FROM A REGULATORY PERSPECTIVE

- Consider the latest employment-related regulatory issues and the effect they will have on your workforce.
- Explore how the 2016 presidential election and the change in administration may impact employment law and regulations.
- Learn effective strategies for minimizing exposure to employment-related claims and disputes.

## TUESDAY, MARCH 21

▲ 8:00 - 9:30 a.m.

### Forums (D)

#### 12-D. HEALTH POLICY FORUM

- Review current, proposed and pending regulatory and legislative issues impacting nursing home providers.
- Hear the latest developments and CMS guidance related to the nursing home requirements of participation.
- Discuss what changes to expect with a new administration and what is moving with Medicare and Medicaid reform.

#### 13-D. HOUSING POLICY FORUM

- Discuss how the new administration and Congress might address affordable senior housing policy issues.
- Recognize the importance of policy action to address the federal budget caps scheduled to be in place for fiscal year 2018.
- Understand LeadingAge's policy priorities and what affordable senior housing providers need to do to help achieve them.

#### 14-D. HOME AND COMMUNITY-BASED SERVICES POLICY FORUM

- Review regulatory changes that impact reimbursement, quality measurement and access to Medicare home health and hospice.
- Hear about legislative action to expand community services and supports for older adults.
- Consider how some of the possible priorities for the new administration and Congress will affect adult day services, home care, non-emergency transportation and PACE.

#### 15-D. CFO FORUM

- Gain insight into key senior living trends impacting the role of CFOs in not-for-profit organizations.
- Hear an overview of the various topics and issues raised by CFOs in the field through the *Ziegler CFO Hotline*.
- Examine the current environment of the capital markets and the financial health of the not-for-profit sector.

#### 16-D. TECHNOLOGY FORUM

- Hear the latest trends on technology adoption and spending among LeadingAge members at the forefront of innovation.
- Recognize the importance of having an IT plan tied to your overall strategic planning efforts and the role of C-level IT professionals.
- Explore available resources created to help aging services providers successfully create a strategic IT plan.

# PEAK EDUCATION: SESSIONS CONTINUED

▲ 12:00 - 3:30 p.m.

## Leadership Workshop (E)

### 18-E. A BLUEPRINT FOR SUCCESSFUL CEO TRANSITIONS

High rates of CEO turnover within aging services organizations require that everyone involved in a leadership transition do their due diligence to make it a smooth process, particularly in the first 18 months of a new CEO's tenure. Geared toward leaders at all levels, this workshop distills the key areas needed to orchestrate a successful CEO transition.

- Consider how a programmatic approach to CEO transitions can increase the odds and shorten the timeframe in which success is likely to be achieved.
- Delve into the critical areas that require leadership team attention, including defining a vision, securing alignment, establishing accountability and understanding organizational culture.
- Discuss the importance of leadership team cohesion for the success of the inbound CEO.

As part of the team at THRUUE, **Daniel Forrester** and **Jennifer Krentel** have worked in both the for-profit and not-for-profit sectors to help C-level executives and board members connect strategy and execution with a high-performing culture.

▲ 12:00 - 1:30 p.m.

## Education Sessions (F)

### 19-F. EMERGING COMPETITION IN A POST-ACUTE MARKETPLACE

- Discuss the growing challenges emerging from for-profit "super-skilled" nursing homes, care management and home care service competition.
- Hear how aging services providers are adapting new business models and growing their skills in the post-hospital care and management arenas.
- Understand the strategic steps not-for-profit aging services providers must take to maintain market share in an increasingly competitive marketplace.

### 20-F. DESIGNING FOR ENGAGEMENT AND PURPOSE

- Recognize consumers' prioritization of activities and programs that incentivize purposeful living and positive engagement.
- Learn how innovative design of the physical environment can enhance new operational programs and complement existing wellness initiatives.
- Consider the many positive benefits of an "engaging" environment, including improved client/resident outcomes, market position, occupancy levels and staff retention.

## 21-F. SHOULD YOU BE IN THE HOME HEALTH BUSINESS?

- Recognize why a growing number of LeadingAge members are looking to add home health to their existing service lines.
- Gain a deeper understanding for the intricacies that differentiate home health services from a traditional skilled nursing setting.
- Learn how to be prepared for the reimbursement challenges, operational differences and nuances of a home health agency.

## 22-F. FINANCING LONG-TERM SERVICES AND SUPPORTS: WHAT CAN WE DO?

- Understand LeadingAge's efforts to reform the country's financing approaches to support long-term care and service delivery.
- Learn how to effectively promote a more sustainable long-term care financing system at the local and state level.
- Discover the relevant issues that a new Congress brings to bear on LeadingAge's financing policy and advocacy work.

## 23-F. MAKING THE BUSINESS CASE FOR CLINICAL LEADERSHIP AND QUALITY

- Explore ways to balance the needs of additional quality initiatives against operational costs and day-to-day challenges.
- Discuss how to leverage your organization in a competitive market to develop a return on investment in quality and quality recognition.
- Learn how to use your own clinical leadership teams to develop, execute, measure and market quality initiatives.

▲ 2:00 - 3:30 p.m.

*Education Sessions (G)*

## 24-G. THE SPONSORSHIP SHUFFLE: STRATEGIC PARTNERSHIPS

- Gain an understanding of the scale and diversity of mergers, acquisitions and affiliations taking place in the senior living sector.
- Discuss how various growth strategies can strengthen an organization's financial position and expand service reach.
- Hear from aging services providers about challenges, opportunities and the lessons learned from recent strategic partnerships.

REGISTER BEFORE  
FEBRUARY 2 AND SAVE!

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## PEAK EDUCATION: SESSIONS CONTINUED

### 25-G. CREATIVITY MEETS CONSTRAINT: FOSTERING AN INNOVATIVE MINDSET

- Consider the need to view innovation not only as an opportunity but also as a responsibility.
- Realize how innovation can happen when passion meets constraints and the impact it can have on your organization's mission.
- Explore examples where this thinking manifests itself in programs that focus on best ways to serve older adults.

### 26-G. PREPARING FOR SUCCESS UNDER RISK-BASED MODELS

- Review the key elements of CMS' latest demos, pilots and initiatives related to bundled or episode payment models.
- Understand the risks and opportunities inherent in these models, including their impact on care delivery and payment for post-acute care providers.
- Learn how providers in mandatory bundled payment areas are approaching the associated quality expectations being developed under these and other models.

### 27-G. STRATEGIES FOR RECRUITING AND RETAINING AN AGING SERVICES WORKFORCE

- Discuss the workforce challenges aging services providers face across care settings.
- Learn how to effectively recruit, retain and develop staff across all professions throughout the continuum of care.
- Explore ways to support and engage workers to improve staff stability and reduce employee turnover.

### 28-G. LEGAL IMPLICATIONS OF THE NEW REQUIREMENTS OF PARTICIPATION RULE

- Understand the CMS Final Rule provisions and recent enforcement initiatives and what is required of various providers.
- Explore the provisions that may have significant legal implications, including facility assessment, quality assurance, compliance, ethics, abuse and neglect.
- Learn how to implement policies and procedures to safeguard against possible legal and regulatory risks.

**▲ 4:00 - 5:30 p.m.**

*Education Sessions (H)*

### 29-H. WHAT DOES THE ON-DEMAND ECONOMY MEAN FOR AGING SERVICES PROVIDERS?

- Discuss how today's sharing economy is impacting older adults' lives by transforming the way healthcare is delivered.
- Hear how two on-demand companies are offering alternatives to traditional, senior-oriented services.
- Consider ways aging services providers can partner with medical service providers to minimize the obstacles of receiving daily and emergency care at home.

### 30-H. PANEL OF PUNDITS: STRATEGIC RISK TAKING

- Discuss the practical and tactical issues that require strategic decision making, including knowing when to take a calculated risk.
- Explore ways to educate your board about the climate in which you operate so it can embrace new ideas and take action.
- Consider how to train staff in risk-taking while establishing an environment of trust where they are allowed to fail.

### 31-H. THE PATH TO C-SUITE INCLUSION: STRATEGIES TO PROMOTE LEADERSHIP DIVERSITY

- Consider a variety of recruitment, mentoring and succession planning approaches for intentionally creating leadership diversity.
- Explore opportunities to collaborate with search firms to ensure your pool of candidates for senior level positions is adequately diverse.
- Take home ideas to guide your efforts toward a leadership team more reflective and representative of our field's diverse workforce.

### 32-H. DATA ANALYTICS FOR LONG-TERM AND POST-ACUTE CARE PROVIDERS

- Gain insights into advanced analytics, dashboards and reporting technologies and their value to aging services providers.
- Learn about various analytics tools available across different product categories and their integration capability with other technologies.
- Hear about aging services providers who have utilized analytics to inform quality care delivery and improve their strategic positioning.

### 33-H. TRANSFORMATIONAL CHANGES IN MEDICAID HOME AND COMMUNITY-BASED SERVICES

- Review various service delivery and care coordination models being used to re-balance Medicaid funding so more older adults can remain in the community.
- Explore the impact of changes in the definition of community services, how they are measured and reimbursed under Medicaid.
- Discuss how the continuation of health homes, Medicaid managed care, the Balancing Incentive and Money Follows the Person programs will transform the delivery of Medicaid services.

# LOBBY DAY

**As a new president and a new Congress take office, many of our services—housing, health care, not-for-profit taxation—may be reexamined as to their utility and cost-effectiveness.** Lobby Day provides an opportunity to get the latest information on legislative and regulatory issues that affect your organization.

Make your voices heard by meeting on Capitol Hill with the people who represent you. Group hill visits are the most direct way to collectively tell lawmakers how their actions impact the work you do and the people you serve.

## WEDNESDAY, MARCH 22

▲ 8:00 a.m.

### BREAKFAST RECEPTION

Join colleagues from your state to gear up for a day on Capitol Hill influencing legislative action!

▲ 8:30 - 10:00 a.m.

### CAPITOL HILL BRIEFING AND STATE CAUCUS

Hear from a D.C. insider on what aging services providers can expect from a Republican-controlled administration and Congress. LeadingAge staff will also review your lobbying schedules and prepare you for the group Hill visits with legislative briefings on key issues as well as other pertinent details you will need for your meetings with lawmakers.

▲ 10:00 a.m. - 5:00 p.m.

### GROUP HILL VISITS

As not-for-profits, you are advocates for your residents, staff, and organization—your voice is indispensable to helping legislators understand and support your missions. We must raise awareness and speak up for policies that remove barriers to not-for-profit housing, Medicare/Medicaid and long-term services and supports.

**Join your colleagues on Capitol Hill by signing up when you register!**



REGISTER BEFORE  
FEBRUARY 2 AND SAVE!

**LEADINGAGE.ORG/PEAK**

*“Caregiving calls us to lean into  
love we didn’t know was possible.”*

# GREATMINDS *gala*

You are cordially invited to an inspirational evening which will impact you in a deeply meaningful way. The Great Minds Gala recognizes LeadingAge members and individuals for positively impacting those with Alzheimer’s disease and their care partners. The gala is a fundraising event held in conjunction with the PEAK Leadership Summit.

**Monday, March 20, 2017**

6:00 p.m. Gala Reception · 7:00 p.m. Gala Dinner

**Marriott Ballroom, Marriott Wardman Park Hotel**

Proceeds from the event are equally distributed between the LeadingAge Innovations Fund, and the Integrace Institute at Copper Ridge for the creation and advancement of education and research initiatives.

To donate, sponsor or buy tickets visit us at

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

or purchase tickets when you register for  
the PEAK Leadership Summit.

*Great Mind Gala Tickets are non refundable.*

# PINNACLE

FOR LEADERSHIP TEAMS OF  
MULTISITE ORGANIZATIONS

March 19, 2017 | Washington, DC

*Additional registration required*

## EXPAND YOUR STRATEGIES— AND YOUR CONNECTIONS

Leadership teams in multisite provider organizations require an expanded set of strategies to address the challenges of a complex operation. We invite you to join with other multisite executives at PINNACLE, an exclusive education and networking event designed expressly for you.


### AGENDA

#### Sunday, March 19, 2017

- 11:30 a.m. Welcome & Networking Lunch
- 12:30 p.m. Keynote Presentation
- 2:30 p.m. Break
- 3:00 p.m. Executive Workshop
- 6:00 p.m. Networking Reception & Dinner

### *Partners for Success*

We extend sincere appreciation to our Gold Partners for supporting PINNACLE.





Sydney Finkelstein's latest book, *Superbosses: How Exceptional Leaders Master the Flow of Talent*, profiles leaders from all walks of life who have helped spawn some of the best talent in their industries. The book describes what they did and how they did it, offering teachable lessons for leaders of any organization.

Join Finkelstein as he guides leaders of multisite organizations through the *Superbosses* playbook.

## UNCOVER THE PRACTICES OF SUPERBOSSSES: MASTER THE FLOW OF TALENT

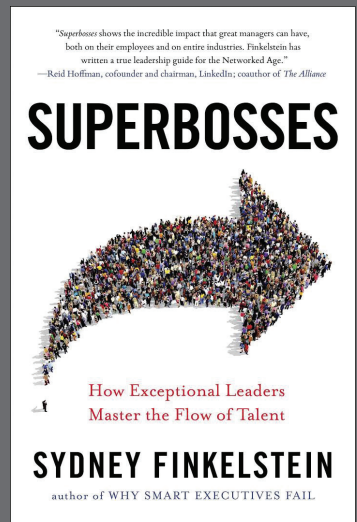
In an era of unprecedented executive transitions and workforce challenges, it is the rare, exceptional leader with the ability to identify, train and develop a future generation of leaders that will be better at grooming talent, creating higher-performing teams and building a more sustainable organization.

Discover how to emulate the common characteristics of these superbosses to build your own powerful network of extraordinary talent. Superbosses share common approaches to identifying newcomers, nurturing rising talent, leading and inspiring their best work and even letting go of great people so they can pay it forward. In doing so, superbosses transform organizations, industries and communities. A good boss achieves set goals and leads teams. A superboss exceeds goals by building an army of new leaders. Which would you rather be?

- Learn how to create master-apprentice relationships, coaching to what each protégé really needs to unleash their true leadership potential.
- Discover how to leverage collaborative cohorts while simultaneously driving healthy internal competition.
- Embrace a new mindset of launching your greatest employees into new paths, transitioning these rock stars into valuable members of your leadership cadre.

**Sydney Finkelstein** is a consultant to senior executives around the globe, as well as an executive coach, focusing on talent development, corporate governance, learning from mistakes and strategies for growth. His approach to leadership and strategy focuses on the strengths and weaknesses of executive talent.

Finkelstein has published 20 books, including the *Wall Street Journal* bestseller *Why Smart Executives Fail*. He is listed in the "Thinkers 50," the world's most prestigious ranking of leadership gurus.



# CONTINUING EDUCATION CREDITS

WORKSHOPS P .....	3.5 HOURS
GENERAL SESSION.....	1.0 HOUR
EDUCATION SESSIONS B, C, F, G AND H .....	1.5 HOURS
FORUMS D .....	1.5 HOURS
LEADERSHIP WORKSHOPS A AND E .....	3.0 HOURS
CAPITOL HILL BRIEFING & STATE CAUCUS....	1.0 HOUR
PINNACLE.....	4.5 HOURS

CE credits cannot be granted if you arrive late or leave prior to the conclusion of a session; partial credit cannot be awarded. LeadingAge will verify credit eligibility based on session attendance and send certificates of attendance in early May.

## NURSING HOME AND ASSISTED LIVING ADMINISTRATORS

This program has been submitted (but not yet approved) for continuing education for **19** total clock hours from NAB/NCERS. Contact **CEs@LeadingAge.org** for more information.

If you are a registered nursing home administrator in the state of Florida, you must provide your license number information on the registration form in order for your credits to be reported to CE Broker.

**Please Note:** LeadingAge is no longer able to secure CE pre-approval for California RCFE administrators.

## FINANCE PROFESSIONALS

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

Maximum CPA Credits Available: **20**; Delivery Method: Group Live; Field of Study: Specialized Knowledge & Applications; Knowledge Level: Intermediate. There are no prerequisites or advance preparation required.

Questions? **CEs@LeadingAge.org**

# PEAK

B A S E C A M P

**PREPARE  
YOURSELF  
FOR WHAT'S  
AHEAD**

**MONDAY** 9:30 a.m. – 1:00 p.m.  
BASECAMP RECEPTION 4:30 – 5:30 p.m.

**TUESDAY** 9:30 a.m. – 12:00 p.m.

To equip your organization for the future, immerse yourself in the issues that matter. PEAK's BaseCamp is a unique interactive environment that combines dynamic learning spaces and salon-style networking with expert hosted kiosks—creating a fresh new way for you to soak up information and direct your thinking. Topic-specific zones define the experience, with dedicated areas that let you zero in on your leadership priorities.

REGISTER BEFORE  
FEBRUARY 2 AND SAVE!

**LEADINGAGE.ORG/PEAK**

# PEAK BASECAMP

## ZONE 1 FINANCIAL STEWARDSHIP AND ORGANIZATIONAL STRENGTH

POWERED BY ZIEGLER



Being financially and operationally strong is the foundation of every successful organization. In the Ziegler “Z-News Live!” *Financial Stewardship & Organizational Strength* Zone, hear the latest research, trends and thought leadership on topics such as the senior living capital markets, characteristics of a financially strong organization and the role of strategy in ensuring long-term financial viability.

## ZONE 2 MARKETING AND CONSUMER PREFERENCES

POWERED BY MOVING STATION



Senior Living professionals know the key to a good first conversation with a prospective resident is discovery. What dialogue needs to happen before that appointment takes place? How can we change our marketing message to meet the changing wants, needs and desires of our consumer and by extension those of our residents? Join your colleagues to discuss the methods they’ve put in place in order to achieve positive census growth in 2017 and beyond.

## ZONE 3 STRATEGIC PLANNING AND PARTNERSHIPS

POWERED BY GREYSTONE



Differentiation: To be successful requires your market to know how you are different and better, providing a desired intangible value that cannot be found, substituted or duplicated by any other provider. To achieve this competitive advantage requires active strategic thinking and alignment of mission, marketed and expected outcomes, product/program, price and willingness to change. Join us to hear how your peers are creating successful mission-driven business outcomes through smart, strategic thinking and innovation. Think Differently. Create Value.

## ZONE 4 AGING SERVICES TECHNOLOGIES

POWERED BY CORNELL COMMUNICATIONS



Leveraging the right technology is as essential as it is challenging in today’s aging services environment. The options seem endless. So how do you decide where to invest resources...and how do you assure you get the desired result? Experience cutting-edge technology solutions and learn how to make the best strategic decisions for your organization. Learn from experts at Cornell Communications and its valued partners how to effectively assess your current needs and identify opportunities to enhance the aging experience while improving operational performance and advancing your mission.

## ZONE 5 OPERATIONAL EXCELLENCE

POWERED BY VALUE FIRST



Optimizing operational performance in healthcare is a national issue. Maximizing revenue and reducing expenses shouldn’t impact the quality of your services and your mission for better care and better outcomes for older adults. Value First, Inc. is a group purchasing organization (GPO) delivering savings to LeadingAge members with over 400 supplier agreements and leveraging more than \$100 billion in annual spend with its partner, Provista. Join Value First and some of our key vendor partners to learn how your community can optimize your operations and achieve operational excellence.

## ZONE 6 START-UP ZONE

POWERED BY CAST



Meet the latest entrants in the aging services space and explore the new solutions and perspectives they bring to the table.

# EXPERT KIOSK HOSTS

AS OF  
DECEMBER 30, 2016

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# REGISTRATION OPTIONS

## PEAK LEADERSHIP SUMMIT

The PEAK categories apply to **PEAK Leadership Summit** providers, business firms, resident/elders and students.

### FULL PEAK PROVIDER (SUNDAY - WEDNESDAY)

- Choice of Workshop (Sun)
- Education Program (Mon/Tues)
- BaseCamp with Boxed Lunch (Mon/Tues)
- Lobby Day with Continental Breakfast (Wed)

**Note:** this category applies to employees of provider organizations, **not** associated with a business firm.

### FULL/DAILY PEAK BUSINESS FIRM (SUNDAY - WEDNESDAY)

- Choice of Workshop (Sun)
- Education Program (Mon/Tues)
- BaseCamp with Boxed Lunch (Mon/Tues)
- Lobby Day with Continental Breakfast (Wed)

**Note:** this category applies to companies and individuals who sell/market products and/or services --and who are **not** hosting in BaseCamp. No daily fee is available with this category.

### DAILY PEAK PROVIDER (CHOICE OF MONDAY - WEDNESDAY)

- Education Program (applicable to day registered)
- BaseCamp with Boxed Lunch (if applicable to day registered)
- Lobby Day with Continental Breakfast (if applicable to day registered)

**Note:** this category applies to employees of provider organizations, **not** associated with a business firm.

### WORKSHOP ONLY (SUNDAY)

- Choice of Workshop (requires additional fee)

### RESIDENT/ELDER (SUNDAY - WEDNESDAY)

- All PEAK Leadership Summit activities listed under the Full PEAK category

**Note:** Residents/elders receiving services from LeadingAge provider member organizations are eligible for this category (not eligible for CE credits).

### STUDENT (SUNDAY - WEDNESDAY OR WEDNESDAY ONLY)

- All PEAK Leadership Summit activities listed under the Full PEAK category (applicable to day(s) registered)

**Note:** Only full-time college/university students in an aging services related program are eligible for this category (not eligible for CE credits). Students will be required to upload proof of status such as a student ID card or letter on department letterhead upon registering.

## PINNACLE FOR LEADERSHIP TEAMS OF MULTISITE ORGANIZATIONS

The **PINNACLE** categories apply only to leadership teams of multisite provider organizations within the LeadingAge membership.

### FULL PEAK PROVIDER + PINNACLE (SUNDAY - WEDNESDAY)

- All PEAK Leadership Summit activities listed under the Full PEAK category
- Networking Lunch, Reception and Dinner (Sun)
- Keynote Presentation and Executive Workshop (Sun)

### PINNACLE ONLY (SUNDAY)

- Networking Lunch, Reception and Dinner (Sun)
- Keynote Presentation and Executive Workshop (Sun)

REGISTER NOW: **LEADINGAGE.ORG/PEAK**

REGISTRATION QUESTIONS? PLEASE E-MAIL **PEAK@SHOWCARE.COM** OR CALL **514-228-3159**. SEE MORE REGISTRATION INFORMATION ONLINE.



The **BaseCamp** categories apply only to business firms hosting BaseCamp Zones/kiosks and to gold partners, silver partners and supporters. Refer to the discounted BaseCamp fees listed below.

ZONE CHAMPION (SUNDAY-WEDNESDAY)

- Full PEAK (limit 8 complimentary badges per organization, includes all activities listed under Full PEAK category)
- Additional Full/Daily PEAK (requires additional fee)
- BaseCamp host responsibilities (Mon/Tues)

EXPERT KIOSK HOST (SUNDAY-WEDNESDAY)

- Full PEAK (limit 4 complimentary badges per organization, includes all activities listed under Full PEAK category)
- Additional Full/Daily PEAK (requires additional fee)
- BaseCamp host responsibilities (Mon/Tues)

START-UP ZONE (SUNDAY-WEDNESDAY)

- Full PEAK (limit 2 complimentary badges per organization, includes all activities listed under Full PEAK category)
- Additional Full/Daily PEAK (requires additional fee)
- BaseCamp host responsibilities (Mon/Tues)



**Great Minds Gala** tickets are an additional purchase for all categories. Tickets are non refundable.

INDIVIDUAL/TABLE TICKETS (MONDAY)

- Great Minds Gala Reception (Mon)
- Great Minds Gala Dinner & Program (Mon)

REGISTRATION FEES			
	MEMBER FEES* (before Feb. 2)	MEMBER FEES* (after Feb. 2)	NON-MEMBER FEES
PEAK (SUN, MARCH 19 - WED, MARCH 22)			
Full PEAK Provider	\$875	\$925	\$1,125
Full/Daily PEAK Business Firm	\$1,595	\$1,595	\$1,795
Daily PEAK Provider (Mon/Tues, fee per day)	\$449	\$499	\$699
Daily PEAK Provider (Wed)	\$225	\$275	\$475
Workshop Only (Sun)	\$199	\$249	\$449
Resident/Elder (Full or Daily) **	\$99	\$99	\$99
Full Student (Sun-Wed) **	\$199	\$199	\$199
Daily Student (Wed only) **	\$49	\$49	\$49
PINNACLE (SUN, MARCH 19)			
Full PEAK Provider + PINNACLE (Sun-Wed)	\$1,075	\$1,075	N/A
Daily PINNACLE (Sun)	\$525	\$525	N/A
BASECAMP (SUN, MARCH 19 - WED, MARCH 22)			
Zone Champion	8 Full PEAK complimentary badges included		
Expert Kiosk Host	4 Full PEAK complimentary badges included		
Start-Up Zone	2 Full PEAK complimentary badges included		
Additional Full PEAK (Sun-Wed)	\$875	\$925	\$1,125
Additional Daily PEAK (Mon/Tues, fee per day)	\$449	\$499	\$699
Additional Daily PEAK (Wed)	\$225	\$275	\$475
GREAT MINDS GALA (MON, MARCH 20)			
Individual Tickets (non refundable)	\$300		
Table (of 10) Tickets (non refundable)	\$3,000		

\* Member fee applies to LeadingAge, Global Ageing Network (formerly IAHSa), CHA, as well as Corporate Alliance Program (CAP) members.  
\*\* Not eligible for CE credits

# HOTEL INFORMATION



## MARRIOTT WARDMAN PARK HOTEL

2660 Woodley Road, NW  
Washington, DC 20008  
202-328-2000

### MAKE YOUR HOTEL RESERVATION

Hotel reservations can be made online at **LeadingAge.org/PEAK** or contact the hotel directly at 202-328-2000 and ask for the LeadingAge room block. The special group rate at the Marriott Wardman Park Hotel for LeadingAge attendees is \$309 for a single/double room, plus taxes. A limited number of rooms have been set aside for PEAK and are first-come, first-serve.

### HOTEL RESERVATION DEADLINE: FEB. 2, 2017

Please make your hotel reservation at the Marriott Wardman Park Hotel no later than Feb. 2, 2017. After this date, reservations will be accepted based on availability.

# GOLD PARTNERS



For more than 35 years, we have been a LeadingAge Gold Partner and Administrator of the **only** LeadingAge-Recognized Insurance Program providing Directors & Officers Liability and Property/Casualty insurance. Accessed by your broker, we provide broad insurance coverages, competitive premiums, and comprehensive risk management education to LeadingAge members.

*A LeadingAge Shared Services Partner and administrator of the LeadingAge-Recognized Insurance Program*



Well at Work. Financial Wellness Planning for the Aging Services workforce. Our program was developed with input from LeadingAge Members to assist with the recruitment and retention of employees as well as the rising cost of employee benefits. We provide financial wellness solutions which include insurance products, PayActiv, TeleMedicine, Benefit Statements, enrollment and communication services all designed to help LeadingAge members and their employees.



Since 1982, Greystone has provided consulting services to 500-plus senior living organizations. We help providers with the business side of senior living, including strategic planning, market/financial analyses, development, financing, marketing and operations.



PointClickCare's cloud-based software platform takes a person-centered approach to managing senior care, connecting healthcare providers across the senior care continuum with easy to use, regulatory-compliant solutions.



PS Lifestyle is a national leader in providing exceptional amenity service and lifestyle solutions for aging adults, families and caregivers.



Sodexo provides unique expertise and skills in improving the Quality of Life for residents, their families and health care professionals at facilities around the world.



As one of the nation's leading underwriters of financing for not-for-profit senior living providers, Ziegler offers creative, tailored solutions to meet our clients' needs.

# SILVER PARTNERS

## ABILITY®

ABILITY Network is a leading information technology company helping providers and payers simplify the administrative and clinical complexities of healthcare through innovative applications and data analytics. Now with eHealth Data Solutions as a part of ABILITY, providers are able to further streamline workflows and increase the bottom line, while driving higher quality and lowering risk.

## experience CPAs & Advisors

BKD National Health Care Group helps 1,600 long-term care and senior living providers nationwide navigate the complex environment and reach their goals. We offer a wide range of reimbursement, tax and audit-related services. BKD also provides a variety of billing, clinical, operational and Advanced Payment Model consulting solutions. Our professionals include CPAs, nurses, administrators and billers who share their broad industry expertise on the issues you face through an ever-expanding library of articles, videos and webinars at [bkd.com/ltc-resources](http://bkd.com/ltc-resources).

## CliftonLarsonAllen

CliftonLarsonAllen helps senior living providers, home health agencies, hospices, and other related enterprises, as well as the owners and executives who lead them, address the significant issues that matter to their business.

## 

Through innovative solutions and unexcelled response to customer needs, Direct Supply helps build, equip and run communities like no other company in Senior Living.

## GLYNNDEVINS

GlynnDevins is the nation's premier marketing and advertising agency providing occupancy solutions for senior living communities and their partners. Our experience in direct marketing, channel and content strategy, strategic brand development, digital marketing, data analytics, marketing automation and CRM is unrivaled in the industry.

## GREENBRIER

Greenbrier provides comprehensive strategic planning, development, marketing and management services to sponsors and owners of senior living communities. These services include:

- Strategic Planning
- Market Analysis
- Financial Analysis
- Site Planning and Acquisition
- Financing
- Development Coordination
- Marketing
- Management

Greenbrier's services result in successful development or repositioning that satisfies our clients' vision and goals.

## FINANCED RIGHT®

Established in 1935, HJ Sims is a full service investment bank that specializes in underwriting senior living financings.

## COMMUNITY ENGAGEMENT RESEARCH & CONSULTING

Holleran specializes in Community Engagement Research and Consulting. Services include stakeholder Engagement and Satisfaction, Leadership Engagement, Organizational Engagement and Community Engagement and Needs Assessments.

## LCS®

LCS® is a leading provider of high-quality senior lifestyle products and services. Customers and partners look to LCS to provide solutions that help them navigate and thrive in a complex, ever-changing environment. The LCS Family of Companies serve more than 35,000 seniors in 31 states. We provide third-party senior living management, capital market services, development and repositioning for Life Plan and rental communities, and offer home health care, insurance, and national volume purchasing services.

LCS is an equal opportunity employer hiring skilled and professional employees to help serve our customers. Visit our careers page for more information.

# OnShift

OnShift’s suite of products for hiring, scheduling and workforce analysis drives quality care, lower costs and higher performance by empowering long-term care and senior living providers to staff consistently and efficiently.



Select Rehabilitation provides comprehensive therapy services with qualified licensed professionals in a variety of clinical settings including SNFs, CCRCs, ALFs, ILFs, home health, and schools.



Unidine leads the industry in dining management and clinical nutrition for the full continuum of senior living and long-term care. Your community deserves a partner like Unidine that is big enough to deliver scale, sophisticated systems, and infrastructure, but is still small enough that each account is a key account, receiving our full energy and attention. We create authentic food from scratch using fresh, responsibly sourced, seasonal ingredients, and combine our passion for culinary excellence with caring, attentive service and seasoned management to deliver a dining experience that reflects your commitment to resident care.

# PHILIPS

Philips introduces the innovative GoSafe mobile personal emergency response service for on-the-go seniors and shares the latest on the CarePoint falls and wander management system.

# LEADINGAGE SUPPORTERS



# CAST SUPPORTERS



**THE AGING SERVICES  
FIELD'S MOST  
INFLUENTIAL PEOPLE  
WILL BE HERE.  
WILL YOU?**

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**LEADINGAGE.ORG/PEAK**



2519 Connecticut Avenue NW  
Washington, DC 20008  
[leadingage.org/peak](http://leadingage.org/peak)