



AGENTS of CHANGE

— THE RISE OF HOMECARE —

2021



Home Care
Association of America

ANNUAL LEADERSHIP CONFERENCE

PREVIEW PROGRAM

SEPTEMBER 26-27 • ORLANDO, FLORIDA • HILTON ORLANDO

WELCOME



Welcome – or *welcome back* – to the HCAOA Annual Leadership Conference! We truly missed seeing all of our attendees and vendors last year, and we are so excited for the opportunity to gather together safely in person for 2021. Be assured that every safety precaution is being taken by both HCAOA and the Hilton Orlando Hotel.

This year's theme, *Agents of Change: The Rise of Home Care*, focuses on the ways our member agencies can forge the path forward for the home care industry – an industry that has been in the spotlight throughout the pandemic more than ever before. The 2021 Annual Leadership Conference is your chance to learn the latest about current issues, innovative trends and the strategies you can implement back home to improve your organization. During the event, attendees will be immersed in the most updated business strategies, best practices, and opportunities to learn from industry leaders. Tracks include:

- Emerging providers
- Established providers
- Innovative trends
- Workforce development

How we operate day-to-day has changed over the last year, and while we hope to return to some normalcy, many aspects of business are going to be altered for the long haul. During the Annual Leadership Conference, the industry's leading vendors will be exhibiting their latest efforts to support home care providers across the country. Take this great opportunity to learn the newest competitive strategies, discover cutting-edge technologies and network with key innovators across the home care industry—all in person and all in one location. What makes the HCAOA Annual Leadership Conference the must-attend event for the home care industry is the caliber of our attendees. We look forward to seeing you all and aim to provide the best networking opportunities possible. While virtual events are a necessary and valuable tool, there is nothing better than the collaboration that takes place when attendees can be face-to-face with industry peers and leaders from around the country. We look forward to this conference being the catalyst for improving the state of home care for your clients, employees, and business owners like you.



A handwritten signature in black ink that reads "Vicki Hoak".

Vicki Hoak
HCAOA Executive Director



A handwritten signature in black ink that reads "Emma R. Dickinson".

Emma Dickinson
HCAOA President

KEYNOTE SPEAKERS



■ Simon Bailey, *Leadership Imagineer*

Spark Customer Love: Customer Service is a Department. Customer Love is a Mindset.

In a world of information overload, SPARK ignites an emotional experience that causes customers to recommend your brand to their family and friends. Organizations and their team members will learn the Platinum Service Principles to create customers for life.

SPARK is a customer experience learning system based on Simon T. Bailey's 30+ years in the hospitality industry. As the former Sales Director for Disney Institute, Simon will teach you this easy and simple "SPARK" framework that you and your team can implement. Learn tangible examples and stories on how to embed the SPARK mindset into your organization.

Simon T. Bailey's purpose is to Spark listeners to lead countries, companies and communities differently. His content is based on more than 30 years of experience in the hospitality industry including serving as sales director for Disney Institute based at Walt Disney World Resort. He has worked with almost 2,000 organizations in 50 countries.



■ Matt Thornhill, *Visionary Futurist*

The Future is Now for Home Care: How to Seize the Post-Pandemic, Boomer-Fueled Growth That's Coming

Over the next ten years the number of adults in the U.S. ages 75 and older will grow from 23 million to over 34 million – a 48% increase thanks to older Boomers. And survey after survey indicates Boomers, even more so than current seniors, want to grow older in their homes. Factor in a post-pandemic world where congregate living comes with a new set of issues, and all signs point to an explosion in Home Care.

How should your organization respond to this opportunity? What are the key steps to take now to be positioned to prosper tomorrow? You'll get insights and specific action steps from Matt Thornhill in this engaging and provocative keynote address. You'll leave with a deeper understanding of how Boomers will transform life's fourth quarter and how your organization can capitalize.

Matt Thornhill is a visionary futurist and national expert on today's older Boomer consumers. For almost 20 years Matt has been sounding the clarion call that the future of senior living and home care will be shaped by America's first dominant generational cohort, Baby Boomers. His insights and perspectives have been featured on NBC Nightly News, CBS Evening News, CNBC, MSNBC, PBS, NPR, and in The Wall Street Journal, Washington Post, Chicago Tribune and Los Angeles Times, not to mention countless podcasts and blog posts.

GENERAL SESSION



Strategies for Success: 5 Things the Most Successful Agencies Are Doing Differently

Erik Madsen, CEO | Home Care Pulse

In the 2021 Home Care Benchmarking Study, we analyzed providers billing more than \$5M in annual revenue to learn what they're doing differently than other agencies. Here are 5 key takeaways.

Join us for this session to:

- Learn where the most successful agencies are (and aren't) spending their money
- Understand which practices separate the best from the rest and which practices don't
- Gain insight into where your focuses should be
- Be able to participate in a panel Q&A session at the end of the session



BREAKOUT SESSIONS

EMERGING PROVIDERS



Onboarding New Clients & Building Foundations for Long Term Relationships

Aishling Dalton Kelly, CEO | Aishling Home Care & Aishling Care Academy

This session drills down to the key components necessary when selling your services to new clients. Join this session to learn how to examine specific strategies to use when bringing on new clients and how to manage your client's needs, individual personalities and balance family dynamics. In addition, this session will focus on foundational strategies for creating meaningful relationships.



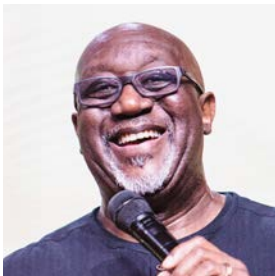
Unlocking User Experience Through Data-Driven Website Design

Kerri Kristoff, Senior Project Manager | corecubed

Every home care agency knows they need to have a website, but not every home care agency website is designed with user experience in mind, causing visitors to abandon the website before converting.

Attend this session to learn:

- Why applying human-centered design principles will increase website conversions
- How data can be used to view website traffic patterns and glean valuable information about your site visitors
- What trust marks are and how they encourage site visitors to continue into your website
- Which home care agency website pages are most visited and acted upon
- Why adding the right kind of fresh content to your website pays off



The Caregiver's Arsenal: Understanding Self Care and Compassion Fatigue

Joseph Thompson, Co-Owner/CEO | Rehoboth Home Care Services

Self Care is critical to the caregiver in order to avoid compassion fatigue, as nothing can be poured out of an empty cup. So what does self care look like? What is it and why is it vital to the caregiver? What is compassion fatigue, and how does it impact effective caregiving? This session will explore the answers to these and other questions in this breakout session.



How to be Unique When Every Agency is Special

Jessica Nobles, Executive Administrator | Home Care Ops

Growing an agency in a limited and over saturated marketplace can seem challenging but in this session attendees will learn how to rise above the competition, increase authority in your community, and create recurring revenue through value based experiences.

BREAKOUT SESSIONS

ESTABLISHED PROVIDERS



The Game is Changing: How Newer and Veteran Operators Influence the Home Care Industry Differently

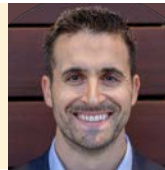
Andrea Cohen, Co-Founder and CEO | HouseWorks

The lure of the private home care industry has never been stronger. It makes sense that the age and experience of home care agency operators influence their business decisions, use of technology, service offerings and long-term vision. Decades ago, the first generation of owners were pioneers with no roadmaps, best practices or private home care industry groups to learn from. Today, the industry is attracting consolidators, tech players, and younger business owners looking to make their mark. Come hear a thought-provoking conversation between both newer and veteran CEOs who shed light on why they chose private home care, their vision of our industry 10 years from now and how they are adapting to the changing tides ahead.

PANELISTS



Bob Roth,
Managing Partner,
Cypress Home
Care Solutions



Daniel Gottschalk
Co-Founder &
President,
Genova Health



Traci Beagley
Founder &
CEO, Sunland
Home Care



Master Scheduling: How to Schedule for 100 Clients with One Scheduler Without Breaking a Sweat

Brett Ringold, Vice President | A Long Term Companion

Scheduling is such a critical part of every agency's success; however, it is also a major pain point for most agencies. In this session, we break down scheduling to its three core parts: pre-scheduling, scheduling, and re-scheduling. We will also share proven methods that any agency can follow, which improve efficiency, eliminate bottlenecks, and result in optimal scheduling practices. By employing these simple techniques, your agency will be able to schedule for at least 100 clients with only one scheduler, without ever breaking a sweat.



Employment Law Update - Hiring, Firing, and Everything in Between

Sami Asaad, Chair, Home Healthcare Practice Group | FordHarrison, LLP

This session will address recent employment legal issues affecting home care agencies, from the recruitment process to separation. Topics will include home-care-specific wage and hour issues, including the latest USDOL guidance and state-law trends, impact of legalization of cannabis, expansion of sick leave laws, best practices for updating personnel policies, handling complaints of sexual and other harassment, responding effectively to disability accommodation requests, and best practices for employee discipline and termination.



A Home Care Owner's Guide To State Advocacy

Adam Blecker, President | Seniors In Place, LLC

As advocates, we understand that advocacy is bigger than us. It requires a different team, a different approach, and a different definition of success. This session will take you through a journey from having no voice in our State Capital, to reinstating a PAC, hiring the right lobbying firm, activating the voice of our membership around Core Values, establishing ourselves as the knowledge leader for home care in our State and building lasting alliances. Participants will learn ideas to amplify advocacy efforts and strengthen the impact home care can have throughout our nation. At no point in our history, has home care advocacy been more important.

BREAKOUT SESSIONS

INNOVATIVE TRENDS



Bringing the Hospital Home

Sheila Davis, Senior Executive Vice President of Operations
Always Best Care Senior Services LLP

In this session, Sheila Davis will discuss the opportunity providers have to play a role in a hospital at home era. Learn how to develop strategic partnerships to become a hospital at home partner, prepare private duty staff to provide confident and competent care for higher acuity patients and describe how hospital at home models keep patients at home. In addition, learn how cost savings of 19% to 30% can be obtained compared to traditional inpatient costs.



Workers' Compensation Insurance Marketplace & Safety Guidelines in Home Care

Gavin Studner, Sales Executive | Odell Studner Group

Outside of payroll, workers' compensation is typically the second largest expense line for home care agencies. Understanding the workers' compensation marketplace, is vital for budgeting & planning purposes. Attend this session to learn about the impact of COVID on the insurance marketplace, the overall state of workers' compensation marketplace, what you can do to mitigate enterprise risk from a safety and loss control perspective and more.



Data Driven Decisions and the Cycle of Growth

Brian Farnum, CFO | Care Advantage, Inc

Participants will learn more about looking for rapid growth opportunities and see what the data metrics really mean to achieve KPIs. Find better, more efficient ways to generate profit over the long term, not just short term growth.



To Be or Not To Be: An Employer of Choice

Patricia Rodgers, Vice President | Waverly Care

This session will provide an "in the trenches" look at hiring and selection by devising an effective behavioral interview form and recruitment program to identify the attitudes you want to hire. This will be a group activity.

This session will also look at leadership and what is important to Direct Care Workers and what makes them stay with your agency. We will look closely at different ways to engage and recognize caregivers to minimize turnover and actually have your employees do the recruiting for your agency.

BREAKOUT SESSIONS

WORKFORCE DEVELOPMENT



Accountability; It's Everybody's Responsibility

Lori A. Hoffner, Professional Speaker, Trainer and Consultant
Supporting CommUnity, Inc.

Accountability; the obligation of an individual or organization to account for its activities, accept responsibility for them, and to disclose the results in a transparent manner. It is the expectation we have for ourselves and others, but how often do we meet it? Do we find solutions when things don't go as we had planned or do we play the blame game? Together we will discuss how we move beyond understanding the need for accountability, to engaging your team in ways that can win their hearts, minds and commitment. Attendees will learn how to create a philosophy of accountability that everyone can embrace and practice. A philosophy that removes fear; increases skills, confidence and reliability.



Secrets of Staffing

David Robinson, Owner | Always Best Care of Greater Boston

Recruiting, hiring and retaining talented caregiver and team members for your agency can lead you to consistent and unparalleled success. David Robinson of Always Best Care has built his caregiving and office team to over 550 people and in 2020 generated 8.3m in revenue. Prior to his experience as a senior care agency owner, David worked as a recruiter in the medical field for over two decades. He will share the techniques and strategies learned throughout his career on how to turn your team into the biggest and best in your territory. By utilizing a collaborative group approach and having attendees share each of their own personal game plans, this session promises to be lively and informative.



Six Secret to Improving 90-day Retention

Stephen Tweed, CEO | Leading Home Care ... a Tweed Jeffries company

According to Home Care Pulse, caregiver turnover in 2019 was 64.3%. Eighty percent of that turnover happens in the first 90 days.

In this interactive program, Stephen Tweed will share the results of the latest research on six specific techniques to improve 90-day retention. That means that your recruiting efforts can go to hiring new people to grow your business instead of replacing caregivers who quit.



The Benefits of Owning Your Own CNA Training School

Carl Bossung, Founder/CEO | Senior1Care

This session will discuss the presenter's journey in establishing an in-house CNA training school including lessons learned and pitfalls to avoid. Learn how the school has impacted caregiver recruiting, training and retention. Hear what Senior1Care did to grow the school and turn it into a profitable line of business contributing to the agency's growth.

SCHEDULE

SATURDAY, SEPTEMBER 25

12:00pm - 1:00pm	Education Committee Meeting
2:00pm - 4:00pm	Chapter + Legislative Committee Meeting
4:00pm - 8:00pm	Registration Open

SUNDAY, SEPTEMBER 26

7:30am - 5:00pm	Registration Open
8:00am - 9:00am	Breakfast (Exhibit Hall)
9:00am - 10:30am	Welcome & Opening Keynote Address
10:30am - 11:00am	AM Break (Exhibit Hall)
11:00am - 12:00pm	Breakout Sessions
12:15pm - 1:30pm	Lunch
1:45pm - 2:45pm	Breakout Sessions
3:00pm - 3:30pm	PM Break (Exhibit Hall)
3:30pm - 4:45pm	General Session
5:00pm - 6:30pm	Opening Reception

MONDAY, SEPTEMBER 27

8:00am - 9:00am	Breakfast (Exhibit Hall)
9:00am - 10:30am	Keynote Session
10:30am - 11:00am	Beverage Break (Exhibit Hall)
11:00am - 12:00pm	Breakout Sessions
12:15pm - 1:30pm	HCAOA Business Meeting & Luncheon
1:45pm - 2:45pm	Breakout Sessions
2:45pm - 3:15pm	Beverage Break (Exhibit Hall)
3:15pm - 4:30pm	Conference Summary Panel with Matt Thornhill & Closing Ceremony



REGISTRATION

Before August 13

Member: \$1,125

Non-Member: \$1,525

After August 13

Member: \$1,275

Non-Member: \$1,675

You can register today [HERE](#).

For hotel accommodations at the Hilton Orlando Hotel, please click [HERE](#) or call 1-800-548-8690. Mention HCAOA Annual Leadership Conference for special \$189 per night guest room rate. Please book accommodations by **August 24, 2021** to ensure you receive the discounted rate.



HOTEL INFORMATION



Tucked away in the heart of Orlando is where you'll discover the Hilton Orlando, a vibrant, contemporary resort with an exciting personality to complement an exceptional location. Centrally located to all major theme-parks and attractions and just minutes from the eclectic dining scene and entertainment of International Drive, this resort sits on over 26 acres of lush landscaping and tropical inspirations making it a true destination in of its own. Guests are immediately welcomed with an upscale feel enhanced with resort-style accommodations and amenities.



To enhance the Orlando dining scene, Hilton Orlando offers seven distinct dining options from the fine-dining experience at Spencer's to the more leisure Tropics Pool Bar & Grill. From a little R&R to making a big splash, the heart of the resort is the expansive recreation area featuring a tropical oasis with sweeping waterfalls overflowing into two pools and a lazy river lined with luxurious cabanas. For more activity, take a plunge down the winding waterslide, or enjoy an afternoon on one of the sports courts. Inside, take the time wellness and enjoy eforea, the 15,000 sq. ft. onsite spa and fitness center.

HCAOA has secured an outstanding rate of \$189 plus tax per night from the Hilton Orlando Hotel. Reservations can be made by calling the Hilton Orlando Hotel at 1-800-548-8690 or by clicking [HERE](#).

Attendees staying at Hilton Orlando Hotel will receive the following amenities:

- Basic In-room Wifi on unlimited devices
- 15% discount at hotel restaurants and lounge (excludes Pool Bar)
- 24-Hour access to the fitness center
- 10% discount on eforea spa services and merchandise
- 25% discount on poolside cabana rentals
- Two I-Ride Trolley tickets daily (\$10 value)

Please book accommodations by **August 24, 2021** and mention that you are an attendee of the HCAOA Annual Leadership Conference to ensure you receive our discounted rate.

You're Already a **Leader** in **Home Care**...

Join the **Leading** Voice of **Home Care**!



Voice on
Capitol Hill
in DC & states



25+ hours of
FREE education
content



Networking
opportunities
with industry
leaders



Only missing
piece is...
YOU!



Join HCAOA between
May and July 2021
and save on
membership dues -
just **\$425** through
the end of the year!

www.hcaoa.org