



Home Care
Association of America



NAVIGATING
the
PERFECT STORM

2014 Leadership Conference
October 12-15 • Kansas City, MO

Hosted by the Home Care Association of America
Serving the Private Duty Home Care Industry for 12 Years



Navigating the Perfect Storm

Welcome to the must-attend meeting for the home care industry, the HCAOA Annual Leadership Conference. This year, with ever evolving regulations on the horizon, home care providers are facing what is culminating into a “Perfect Storm,” a time of dramatic change for care providers across the country. Accordingly, home care providers need to adapt to changes and develop strategies to remain competitive in this new era. The HCAOA conference will dive deeper into critical issues such as the Affordable Care Act and the Companion Care exemption as we help you steer through any rough seas that may lie ahead and ensure smooth sailing for years to come.

The 2014 Home Care Association of America Leadership Conference is your opportunity to learn about current issues, trends, and strategies that will help your organization thrive and become more competitive by acquiring and retaining more customers. Attendees will be immersed in the latest home care innovations, business strategies, practices and methods throughout the conference and have the opportunity to learn from industry leaders in keynote speeches and expert breakout sessions on a range of must-see topics:

- Marketing and Business Development
- Management/Operations
- Human Resources/Recruitment/Retention
- Legal and Regulatory Issues

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

Hotel Information

Our host hotel for the 2014 Leadership Conference is the Sheraton Kansas City Hotel at the Crown Center. It is located in the heart of downtown Kansas City, MO. Enjoy this beautiful property, surrounded by great dining, nightlife, shopping and is connected via sky bridge to the Hallmark Headquarters known as the Crown Center. The Sheraton Kansas City Hotel at the Crown Center has given the HCAOA an outstanding rate of \$139.00 plus tax. Reservations can be made by calling the hotel at (866) 932-6214. Please mention that you are an attendee of the HCAOA Leadership Conference to ensure you receive our discounted rate.





NAVIGATING THE PERFECT STORM: SETTING THE SAILS FOR SUCCESS

Register now for the Advance Pre-Conference Event held October 12! Our pre-conference event will take a preview of HCAOA's future course, with an in-depth dive into the Affordable Care Act and the Companion Care Act. We've gathered three industry leaders from across the nation who will prepare you for the challenges you may face navigating your organization through these high seas and equip you with the information required to remain ahead of your competition.

Our expert speakers will address upcoming challenges, threats, and opportunities in these four intensive sessions. This exclusive pre-conference event will prepare you for success in the year ahead and is a must-attend event of our annual leadership meeting.

PRE-CONFERENCE • OCTOBER 12

Phil Bongiorno, Executive Director • HCAOA

Charting The Course For Home Care in 2015 • 9:00 am - 10:30 am



Join HCAOA Board Members and Executive Director Phil Bongiorno as they bring you up to speed and navigate you through an overview of the year ahead for the home care industry. This pre-conference session will provide attendees with important organizational updates as HCAOA continues to ensure you remain competitive and engaged on the current issues, trends, and strategies that are charting the course for the home care industry. Get the latest news from our leadership team and receive practical tools and proven expertise to help you manage business change, improve efficiency, and grow your organization in 2015.

Stephen Tweed, CEO • Leading Home Care

Navigating the FOG of Health Care Reform • 10:45 am - 12:15 pm



Home Care in America will experience the "Perfect Storm" in 2015 with the implementation of The Affordable Care Act, the elimination of the Federal Companionship Exemption for overtime pay for caregivers, and the increasing competition in the private pay home care marketplace. Never before has our industry experienced this unique combination of outside forces that could have a negative impact on the ability of owners to grow their businesses. This session will discuss how home care companies will deal with the employer mandate and other regulations of the Affordable Care Act.

Navigating the Storm of Overtime Pay and Increasing Competition • 1:30 pm - 3:00 pm

In this subsequent session, Stephen Tweed will facilitate a discussion of how home care companies will deal with overtime pay, live-in care, staff shortages and increasing competition in a crowded marketplace. First, he will outline the specific issues that home care business owners must face going into 2015. Then he will interview a panel of industry leaders and company owners to draw out the latest research and solutions to these industry-changing challenges. Finally, Stephen will facilitate questions and discussion from the audience to generate the best possible solutions to the triple threat of 2015.

Bob King, Founder • Legally Nanny

Changes to the Companionship Exemption and Federal Wage and Hour Updates and Q&A • 3:15 pm - 4:45 pm



With regulation of the home care industry ever evolving, this program focuses on the changes to the companionship exemption and how to structure staffing in order to comply most effectively with the new laws. This session also provides other legal updates on federal wage and hour issues and allows time for audience questions and participation in an interactive session designed to clarify confusion surrounding the implementation of this new rule.



KEYNOTE • OCTOBER 13

Donald Cooper, President • Donald Cooper Cooperation Winning the Talent War!



Whether your business is large or small, not having the right people in every position carries a huge bottom-line cost in lost business, inefficiency, missed opportunity and frustration! The talent crunch is real, and will last for decades. In less than 10 years time, we'll see many businesses fail because they're unable to find the talent they need. Sadly, many business owners and managers have convinced themselves that, "You just can't get good people anymore!" They're in denial and they've given up! The truth is that the best people have to work for somebody...it's just that we have to deserve them.

We become what we hire...so we need to attract and hire extraordinary talent, not just 'bodies.' Then, we must train, inspire and empower them to WOW our customers, achieve world-class operating efficiency and grow our bottom line. Everyone on our team must be clear about our customer promise, our direction and our values. They must be committed to specific outcomes, be held accountable for their performance and rewarded for their success. Then, non-performance must be dealt with promptly and firmly. Lack of accountability and failure to deal with non-performance are two of the biggest problems in many businesses today. So, we must all manage smarter. Donald's 8 steps to attracting, leading and keeping the best staff deliver a clear and effective process that will help make you a world-class recruiter, a world-class boss...and a world-class business.

GENERAL SESSION • OCTOBER 14

Billy Riggs, President • Billy Riggs Enterprises PRESTO CHANGO! – Making Change a Positively Magical Experience



Harbor no illusions: new health care laws will revolutionize the way home health care providers operate in the future. New government regulations, combined with an ever-shifting business environment, are creating gale-force winds for home care providers. Companies who thrive in this new arena will be those whose leaders recognize that change affords – and demands – an opportunity for tremendous growth. In a completely uplifting and helpful presentation, comedy magician Billy Riggs dispels the psychological grand illusions that limit growth and reveals the truths that will enable you to navigate The Perfect Storm.

GENERAL SESSION • OCTOBER 15

Patrick Cooney, President • The Federal Group, Inc. HCAOA Legislative Update



The Federal Group will assist HCAOA members in their efforts to be successful advocates on behalf of the home care community. During this session, attendees will have the opportunity to hear from HCAOA's federal lobbyist on legislative and regulatory opportunities and challenges that exist for home care providers; learn more about what states are experiencing in the way of home care legislation and discuss the outlook for the 2015 legislative session; learn about the development of a political action committee for HCAOA members and how it can help in building strong champions for home care; and learn about HCAOA's legislative grassroots alert and legislative tracking system and how chapters can utilize it to track state legislation. Come learn about the issues and hear how HCAOA is strengthening your voice in Washington, D.C., and around the nation.

BREAKOUT SESSIONS

Christina Chartrand, Senior VP of Training • Senior Helpers Guidelines to Providing Excellent Training

Hiring and retaining quality office staff and caregivers is critical to the growth of your business. One way to retain staff is provide them with the tools and training they need to perform their job better. HCAOA's Standard and Ethics Committee has created a guide to selecting a training program for your caregivers and empowering them with the necessary resources they need to succeed and cultivate lasting relationships with clients.



Aaron Marcum, CEO • Home Care Pulse Running a Home Care Business That Doesn't Run You



Are you on track with your personal and professional goals or have you been sidelined by the tugs and pulls of managing a business that cannot run without you? Aaron Marcum will discuss five powerful strategies that will help you realign your professional and personal responsibilities in order to allow your business to flourish while simultaneously granting you the freedom you need to enjoy your personal life.



**David Robinson, Owner • Always Best Care Boston
The Secrets of Staffing**

Caregivers and administrative staff are the lifeblood of our industry and our most important assets as a business. Sourcing, recruiting, interviewing, hiring, and training top notch caregivers and office team members will set you apart from your competition. With over 20 years of personnel recruitment experience, David will share the tricks of the trade required to more effectively manage your organization's human resources and enable you to acquire and retain individuals who personify the high standards our industry upholds.



**Bob Roth, Managing Partner • Cypress Home Care
Master Marketing Plans that Attract New Clients**

An effective marketing strategy is integral to the success of any business. This presentation will help agencies develop a marketing plan that assists home care owners in determining how, who, and where to market their home care business. Bob's step by step marketing process will enable attendees to learn the best methods for developing a tailored marketing plan that aligns with their unique business needs and local markets.



**Stephen Tweed, CEO • Leading Home Care
Lessons from Home Care's Mega Companies**

What is it that makes the biggest home care companies in America different from the median sized company in our industry? To find out, we will talk to three owners of home care companies that are in the top 5% according to the 2014 Private Duty Benchmarking Study from Home Care Pulse and HCAOA. In 2013, The Academy for Private Duty Home Care® launched an innovative concept called the Private Duty Mastermind Group. The first Mastermind Group to be formed was the \$5 Million Mastermind. Five companies that generate more than \$5 million in revenue per year came together and formed the group. Today, these companies average over \$10 million in Revenue, and bill more than 10,000 hours per week. If you would like to know how they have grown their businesses to this size, join us for this open and honest conversation from home care's Mega Companies.



**Val Neighbors, CEO • Home Care Growth Expert
5 Top Strategies to Find Clients That Can Afford You!**

A successful sales strategy is essential to the long-term viability of any home care agency. Val will walk participants through a series of proven success sales strategies delivered in a format that can be taught and replicated within your organization to create ongoing referrals and increase sales. As a result of attending this session, participants will be able to describe the referral accounts that private duty sales people should target, define the three basic mistakes that sales people make with their referral sources, provide four specific methods for creating continuous referrals from key accounts, and implement these new strategies immediately into their business to increase sales and use the knowledge to train future sales people.



**Joseph Maddaloni Jr., Attorney • Lentz & Gengaro LLP
Understanding Employees vs. Independent Contractor Models for Providing Home Care**

The elimination of the companionship exemption in January of 2015 has many home care agency owners and operators looking to the registry model for providing home care services as an alternative. This program led by attorney Joseph Maddaloni Jr. will discuss and compare the employee and the independent contractor models for providing home care, including the cost to consumers, the control over the care provided, and the perception of risks. This program will also discuss the key legal differences and considerations between the different models for providing home care, and how to address these differences so as to reduce the risk of liability.



**Eileen Maguire, Attorney • Gilliland Law Firm
Personnel, Policies/Employee Handbooks**

An agency's personnel policies and employee handbooks are one of the most important legal documents of a home care agency, yet too often they are poorly written and do not accurately reflect the necessary legal requirements. This presentation led by Eileen will address why agencies need to develop well written personal policies and employee handbooks, and what to include in each of these documents. This session will also include a discussion of how recent National Labor Relations Board decisions have made many common policies unlawful, the top agency mistakes that are being made across the industry, and tips for drafting policies that avoid misunderstandings rather than creating them.



**Beth Comers, CEO • FOG, LLC (For Our Grandparents)
Better Health Outcomes in the Age of the ACA**

As providers are under increasing pressure following the passage of the Affordable Care Act, the home care industry is in the unique position to show a greater partnership with referral sources by using fitness to extend treatment benefits to help seniors achieve better health outcomes. Beth will discuss maximizing these types of opportunities as our industry looks to leverage partnerships to engage more individuals receiving home care services and enhancing their quality of life.



**Julia Finken, Associate Director • The Joint Commission
Effective Care Transitions: The Vital Competency for the Successful Home Care Organization of the Future**

Developing an effective care transitions program is a vital step towards securing the current and future success of your home care company. The participant will learn the steps to developing a state of the art care transitions program that is widely recognized by potential partners along the care continuum. The participant will also learn how to leverage this program to secure partners along the health care continuum. Finally, this presentation will include implementation strategies including key technical and non-technical tools, quality monitoring techniques and operational tips.





**David Glickman , COO • Lively
Reinventing Tech-Enabled Care**

While private home care will help stem the tide of the total number of people requiring care over the next century, new technology advances will help deliver more response care when it's needed – as well as outfit a smart home that extends a person's life of independence and ability to remain in the comfort of their home as they age. David will discuss the types of opportunities and challenges care providers will face as society continues to revolutionize the way home care providers fulfill the daily needs of their clients and families.



**Steve Miskovic, Program Director • Memory Care Home Solutions
Evidence-Based Dementia Care in the Community**

Understanding how to meet the needs of home care clients experiencing from dementia continues to be an increasingly important skillset for care providers and their agencies to recognize. Steve will be addressing some of the common concerns when working with clients experiencing dementia and he will walk participants through best practices and approaches to treatment. Ensuring dementia-care patients and their families are comfortable and able to maintain a level independence in their home environment is critical to their long-term outcome. To this end, a truly a collaborative and community approach is needed to ensure their safety and welfare.



**John Gilliland, Attorney • Gilliland Law Firm
Employer Mandate - The Final Regulations**

With final regulations for the Employer Mandate published in February 2014, many changes have already been implemented with future additions and clarifications still down the road. Many “transitional provisions” have been established to assist employers in achieving compliance. This presentation will review those provisions along with other important aspects of the final regulations. Key topics will include how to properly count employees, what are the “affordability safe harbors,” and what conditions must be met to delay compliance until January 1, 2016. The presentation will address the issues that are important to all sizes of agencies and will provide valuable insight to all business owners regarding future challenges they may encounter.



**Jeff Salter, CEO • Caring Senior Service
The Amplification Effect: Combining Systems and Leadership**

Sometimes leadership can get so far ahead of their team to the extent that team members lose sight of the organization's vision and overarching strategy. Further, systems without the proper vision to support them can create ineffectiveness, chaos, and discontent. Combining systems with leadership provides a clearer path to success and platform for unfettered growth. Jeff's discussion will tackle these challenges you face as a home care leader and help you to develop manageable solutions to tackle them head on and increase effectiveness and mission alignment between your management and care providers.



**Mary Schantz, Executive Director • Missouri Alliance for Home Care
Collaborative Ideas for State-Based Improvement of the Private Duty Industry**

Being a non-licensed state, Missouri Private Duty Providers are constantly looking for ways to “raise the bar” for their industry while minimizing the unfair burdens of traditional licensure. Mary Schantz, Executive Director of the Missouri Alliance for Home Care, will discuss how her state's Private Duty Industry is working collaboratively with the state's home care associations, legislative leaders, regulatory agencies, and consumer groups. Their efforts have focused on communication between home care stakeholders (Medicare, Medicaid, Private Duty), enhancing consumer information, increasing legislative advocacy, and enhancing caregiver career advancement. All of these efforts are aimed at improving the home care experience for the state's clients, caregivers and agencies and this discussion will illustrate how participants can replicate this model in their own home states.

**Donald Cummins, President • Stoneridge Partners
Building the Value of a Home Health Agency...from an M&A Perspective**

Given the many changes that have taken place over the past few years in the regulatory arena regarding home care, we will show how large corporate buyers and private equity groups develop their pricing strategy in their evaluation of various home care providers. Using that information and understanding the methodology, we will show how that price can be increased and how businesses can maximize their profitability while simultaneously minimizing mistakes.





SUNDAY, OCTOBER 12

9:00 am - 4:45 pm Pre-Conference Event (*Details on page 3*)

MONDAY, OCTOBER 13

8:00 am - 10:00 am Breakfast/Registration & Exhibit Hall Open
 10:00 am - 11:30 am Welcome and Keynote • Donald Cooper
 11:45 am - 1:15 pm Lunch in Exhibit Hall
 1:30 pm - 3:00 pm Breakout Sessions
 3:00 pm - 3:30 pm Refreshment Break • Exhibit Hall
 3:30 pm - 5:00 pm Peer-to-Peer Discussion Tables
 5:30 pm - 7:30 pm Opening Night Reception • Exhibit Hall

TUESDAY, OCTOBER 14

8:00 am - 8:55 am Breakfast • Exhibit Hall
 9:00 am - 10:30 am General Session Speaker • Billy Riggs
 10:30 am - 10:55 am Beverage Break • Exhibit Hall
 11:00 am - 12:30 pm Breakout Sessions
 12:45 pm - 2:30 pm HCAOA Business Meeting & Lunch
 2:45 pm - 3:15 pm Refreshment Break • Exhibit Hall
 3:30 pm - 5:00 pm Breakout Sessions

WEDNESDAY, OCTOBER 15

8:00 am - 8:30 am Breakfast • Exhibit Hall
 8:30 am - 10:00 am Breakout Sessions
 10:00 am - 10:15 am Beverage Break • Exhibit Hall
 10:15 am - 11:45 am Legislative Update • Patrick Cooney
 11:45 am - 12:30 pm Closing • Grab & Go Lunch

REGISTRATION

Pre-Conference \$400 Member • \$600 Non-Member

Conference
Until August 1 \$750 Member • \$950 Non-Member
After August 1 \$800 Member • \$1000 Non-Member

BUNDLE PRE-CONFERENCE & CONFERENCE REGISTRATIONS AND SAVE \$100!

You can register today online by going to www.hcaoa.org

Call 1-866-932-6214 to make hotel reservations. Mention HCAOA Conference for special \$139 rate.



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REGISTER NOW!



For full conference information
and to register, please visit
www.hcaoa.org

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