2024 Annual Conference and Expo

COURAGE IGNITED

MAY 7-10, 2024
The Omni Grove Park Inn
Asheville, NC
Who we are

LeadingAge North Carolina is an association of member retirement communities across the state that include continuing care retirement communities (also known as life plan communities) and affordable housing providers. As advocates, we leverage our collective voice to champion the needs of North Carolinians as they age. Our mission is to catalyze the development of innovative communities committed to promoting healthy aging in our society. Central to our mission is the power of connection — linking expertise and communities to empower our members for success. Through collaborative efforts with our members, we organize continuing education opportunities to support staff in maintaining their licenses and certifications, culminating in our flagship event, the Annual Conference and Expo held each May.

Beyond education, we foster a supportive network for staff statewide through leadership retreats, luncheons, and other gatherings. As the state affiliate of national LeadingAge based in Washington, DC, we align with their vision to cultivate a robust workforce through initiatives like the Leadership Academy, ensuring excellence in aging services for generations to come.
Join us at the LeadingAge North Carolina Annual Conference and Expo where we’ll delve into innovative approaches to redefine our work. Our time together will spark creativity and courage to surmount obstacles, embrace risks, and pursue goals with confidence. Engage with industry experts, connect with peers in aging services, and explore cutting-edge products and services. Whether you’re a member seeking to motivate your team or a business partner aiming to share insights, our event offers all you need to foster resilience. Join us in fueling your passion for serving others and contributing to a brighter future for aging in North Carolina.

As we anticipate our upcoming gathering, we want to emphasize the following:
• Your safety is paramount to us. Our partner hotels have implemented comprehensive safety measures, including enhanced cleaning protocols, upgraded ventilation systems, and strict adherence to CDC guidelines.
• We understand that not all attendees may be able to join us in person. Therefore, we are excited to offer virtual access to keynote and deep dive sessions, ensuring that everyone can participate in this year’s conference regardless of location.

Join us
Attendees from aging services providers across North Carolina converge at our Annual Conference and Expo annually. They comprise aging services leaders, decision-makers, and professionals eager to:
• Gain insights from esteemed industry experts and thought leaders, covering a diverse range of topics pertinent to aging services.
• Engage with peers in aging services
• Explore cutting-edge products, services, and innovative business models showcased by over 60 exhibitors.
• Celebrate excellence through awards recognition, honoring individuals who elevate their communities’ standards.
• Depart equipped with actionable takeaways to enhance their communities, ensuring tangible benefits from their conference experience.
Three ways to register

For more information regarding registration please contact LeadingAge North Carolina at 919.571.8333.

1) COMPLETE ONLINE, www.LeadingAgeNC.org. Please login to receive member rates. -OR-
2) FAX registration forms to 919.869.1811. -OR-
3) MAIL with payment to: LeadingAge NC, PO Box 27527, Raleigh, NC 27611.

Make checks payable to LeadingAge North Carolina.

Please do not email registration forms. The registration deadline is April 21, 2024.

Cancellation policy

Written requests for cancellation must be received at the LeadingAge North Carolina Office no later than April 12, 2024. All cancellations received prior to April 12, 2024 will be refunded less a $75.00 administrative fee. All cancellations received after April 12, 2024 will be non-refundable.

Hotel accommodations

Reservations must be made no later than April 8, 2024 to receive the discounted rate. A hotel reservation link will be provided after conference registration is received.

A block of rooms is being held for conference participants at the following hotels:

The Omni Grove Park Inn
290 Macon Avenue, Asheville, NC 28804
LeadingAge North Carolina conference room rate of $299/night.
Parking, upgrades and resort fees are additional.

Element Asheville Downtown
62 College Place, Asheville, NC 28801
LeadingAge North Carolina conference room rate of $134/night.

Important disclaimers & COVID-19 notices:

LeadingAge North Carolina, Inc. (“LeadingAge North Carolina”) cannot guarantee that I will not be exposed to the novel coronavirus (“COVID-19”) while attending the Event or any related activities. I acknowledge and understand that as a result of voluntarily attending the Event, I may be increasing my risk of contracting COVID-19 and spreading it to others, including family members. I acknowledge that, due to its physical nature, the Event may carry a greater risk than other activities of exposure to COVID-19, and that, even when all reasonable precautions are taken, there is an unavoidable risk of exposure to COVID-19. By choosing to attend in person, I understand the hazards of COVID-19 and acknowledge that I am familiar with all of the Centers for Disease Control and Prevention (“CDC”) guidelines regarding COVID-19. Notwithstanding the risks associated with COVID-19, which I readily acknowledge, I hereby willingly and voluntarily choose to attend the LeadingAge North Carolina Event. I acknowledge and knowingly, voluntarily, and fully assume the risk of illness, injury, or death or other damages of myself and/or any family members related to COVID-19 arising from my being on the premises and/or attending the Event. I further agree to at all times adhere to and follow all mask wearing and social distancing requirements of the sponsor site for the event, or as required by law. I do hereby release and forever discharge and hold harmless LeadingAge North Carolina, its successors, assigns, directors, officers, employees, agents, members, lawyers and representatives from any and all liability, claims, causes of action, or demands of whatever kind or nature, in law or in equity, that may arise from attending the Event and related activities (including but not limited to COVID-19).

It is the sole responsibility of each attendee to ensure their personal dietary needs are met at each event. While LeadingAge North Carolina is happy to provide your request to our host property, we have no way of ensuring host property compliance or regulating host property kitchen activities.
**FULL CONFERENCE SCHEDULE**

**Tuesday, May 7**
- 2:00-5:30 Registration
- 5:00-6:30 Welcome Reception
- 6:00-7:30 Board of Directors/Trustees Dinner

**Wednesday, May 8**
- 7:30-9:30 Registration
- 8:00-9:00 Continental Breakfast in Expo Hall – Booths Open
- 8:00-9:00 Leaders of Color and Allies Coffee and Conversation
- 9:00-10:30 Opening Session: Pete Smith
- 10:45-11:45 Concurrent Sessions 1
- 11:30-2:30 Expo and Lunch (Lunch available 12:00-1:30)
- 2:30-4:30 Deep Dive: State of LTC and Alternative Revenue Streams
- 2:30-3:30 Concurrent Sessions 2
- 3:45-4:45 Concurrent Sessions 3
- 5:00-6:00 Attendee/Exhibitor Reception
- 6:00-7:30 Leadership Academy Reception (Invitation Only)

**Thursday, May 9**
- 7:30-9:30 Registration
- 8:00-9:15 Executive Leadership Breakfast
- 8:30-9:30 Attendee Continental Breakfast
- 9:30-11:00 Showcase 2024
- 11:15-12:15 Deep Dive: Regulatory Update
- 11:15-12:15 Concurrent Sessions 4
- 12:30-2:00 Awards Luncheon
- 2:15-3:15 Deep Dive: Navigating Change
- 2:15-3:15 Concurrent Sessions 5
- 3:30-4:30 Deep Dive: Recognize, Respond, Survive
- 3:30-4:30 Concurrent Sessions 6

**Friday, May 10**
- 9:00-11:00 Closing Session: Scott Code

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**VIRTUAL SCHEDULE**

**Wednesday, May 8**
- 9:00-10:30 Opening Session: Pete Smith
- 2:30-4:30 Deep Dive: State of LTC and Alternative Revenue Streams

**Thursday, May 9**
- 9:30-11:00 Showcase 2024
- 11:15-12:15 Deep Dive: Regulatory Update
- 2:15-3:15 Deep Dive: Navigating Change
- 3:30-4:30 Deep Dive: Recognize, Respond, Survive

**Friday, May 10**
- 9:00-11:00 Closing Session: Scott Code

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**ALL VIRTUAL SESSIONS WILL BE LIVE-STREAMED AND AVAILABLE TO IN-PERSON ATTENDEES**
Continuing education credit

- **National Association of State Boards of Accountancy:** A total of 13.0 (in-person) and 12.0 (virtual) continuing professional education hours will be applied for through the National Association of State Boards of Accountancy. LeadingAge North Carolina 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. All sessions are basic level, with no prerequisites and/or advance preparation required. All sessions are classified as specialized knowledge field of study. Delivery method is Group-Live and Group Internet Based.

- **North Carolina Board of Examiners for Nursing Home Administrators:** A maximum of 12.0 hours of continuing education credit for Nursing Home Administrators may be earned by attending all sessions. Each educational session will be applied for separately and every session attended will be credited with CEUs. Credit is applied for through the North Carolina Board of Examiners for Nursing Home Administrators and the North Carolina Division of Health Service Regulation for Adult Care Licensure.

- **National Association of Long Term Care Administrator Boards:** This program has been submitted to the National Association of Long Term Care Administrator Boards for approval.

- **HR Certification Institute:** This program has been submitted to the HR Certification Institute for review.

**Participants must stay for the entire session to receive credit.**
Virtual session participants must be logged in and stay for the entire session at the scheduled time, and complete session evaluation to receive credit.

Certificates of Attendance and CEU Certificates will be mailed within 30 days post conference.

**No soliciting except registered exhibitors:** Annual Conference attendees agree to refrain from marketing products or services during the conference. Registered exhibitors are the exception. Please note that any attendee who is observed soliciting business OR distributing promotional materials in meeting rooms, exhibit hall, or other public spaces may be asked to leave.

**Photography and video release statement:** Sessions and activities may be photographed or video-recorded. Attendance at the Annual Conference constitutes the consent of all attendees to the future broadcast, publication or other use of photographs or videos at the sole discretion of LeadingAge North Carolina.
Wednesday, May 8  8:00am – 9:00am
Leaders of Color and Allies Coffee and Conversation
The Leaders of Color Network is open to all LeadingAge North Carolina community members including emerging, midlevel, and senior leaders of color. Program members are active year-round through opportunities provided by the state and national LeadingAge. Make plans to attend the inaugural meet up at the conference.

We will meet up on Wednesday, May 8 from 8:00am-9:00am. The Leaders of Color Member Network Coffee and Conversation will be informal and will serve as a meet and greet, which will include an open discussion about the purpose and structure of the network and its future activities and events. Be sure to sign up in advance so we know to expect you. All are welcome – leaders of color and allies!

Wednesday, May 8  2:30pm – 4:30pm
State of LTC and Alternative Revenue Streams
This session reviews all key aspects associated with the current senior living landscape. An overview of consolidation trends, skilled nursing environment, growth initiatives, diversification strategies, and the financial health of the sector will be provided. Key focus area will include a panel discussion on creative, new initiatives that many communities nationwide are implementing as alternative revenue streams.

Presenter(s):
Tommy Brewer, Ziegler
Tad Melton, Ziegler
Deep Dives
Available In-Person and Virtually

Thursday, May 9  11:15am-12:15pm

Regulatory Update
Join representatives from the NC Medical Care Commission, and the NC Department of Insurance for a regulatory update about issues that directly affect life plan communities.

Presenter(s):
Geary Knapp, NC Medical Care Commission
Jeff Trendel, NC Department of Insurance
Nancy Wise, NC Department of Insurance

Thursday, May 9  2:15pm - 3:15pm

Navigating Change – No Matter Who You Are
As a leader, your influence is pivotal in guiding your organization or team through inevitable and constant changes. Will these changes be perceived as unanticipated obstacles, unwelcomed potholes, and culture-destroying ruts? Or will they propel your organization towards a more intentional purpose, strategic communication processes, a clearly identifiable culture, and a tightly bonded team? Join us for a session that identifies five best practices for leading during times of change and uncertainty. The session will feature a panel discussion with representatives from two CCRCs, providing real-world insights and strategies for effective leadership in dynamic environments.

Presenter(s):
William Keel, BK Leads LLC

Thursday, May 9  3:30pm - 4:30pm

Recognize, Respond, Survive.....Are You Truly Prepared to Survive an Active Shooter Event
Join us for a session that combines lecture and hands-on training to educate participants on current trends in active shooter incidents. Learn appropriate actions to increase survival chances during an active shooter event, as well as how to use basic medical equipment to save lives.

Presenter(s):
Chad Ayers, ProActive Response Group
DARE TO MATTER

In a world becoming dominated by technology, it’s the people — who they are, what they know, what they do, and how they show up — that still matter most, especially in the aging care field.

But sometimes it’s not even enough to “just show up,” as basic an expectation that it is, right? I mean, sometimes people show up... and we secretly, or not secretly, wish they didn’t! We need to show up like it matters.

“To matter” is to live with intention... to focus our talents, our skills, our knowledge, our desires, toward the ultimate goal of positively impacting the lives of others; to spend our lives in a relentless and unapologetic pursuit of Significance.

By the end of this presentation, you will be inspired to action, not just because you know with certainty that you matter but, more importantly, because you’re challenged and encouraged to go out into the world to explore just how much you can “Matter More.”

Pete Smith
Author, Speaker, Founder of Matter More Coffee

Pete Smith’s focus has been the same for over 25 years: help individuals, teams, and organizations run their race to win. He is the author of Dare to Matter, the #1 Best Seller in the HR and Personnel Management Category, and the #2 Best Seller in the Business Motivation and Self-Improvement category.

In addition to speaking throughout the country, from 2020 - 2024, Pete founded and recently sold Matter More Coffee, the award winning coffee shop located in Hampstead, NC. Lastly, in his seemingly spare time that his wife does not believe he has, Pete is a high school wrestling coach and was awarded the Conference Coach of the Year.
SHOWCASE 2024

Join us for an engaging session led by LeadingAge North Carolina President and CEO, Tom Akins, when we’ll explore next practices and best practices that will shape our direction in the upcoming year. As part of this session, we’re thrilled to announce a special workforce initiative designed to foster a culture of growth and collaboration. Additionally, we'll take a moment to honor the dedication and achievements of several advocacy champions. These individuals have been instrumental in making significant contributions to our community. Join us as we celebrate our collective strengths and find renewal and inspiration for 2024.

Tom Akins

President and CEO, LeadingAge North Carolina
EXPLORING TECHNOLOGY TRENDS IN AGING SERVICES

Attendees will embark on a comprehensive journey through the latest advancements in aging services technologies, with a special focus on artificial intelligence, robotics (including physical robotics and robotic process automation), resident-facing technologies, and data analytics. This exploration will highlight not only how these innovations are revolutionizing care services by enhancing resident independence and quality of life but also how they are profoundly empowering the workforce. By integrating technologies that support staff in delivering more personalized and efficient care, these advancements contribute significantly to optimizing operational efficiency and workforce satisfaction. The discussion will offer insightful analysis on current trends and practical applications, showcasing the significant impact of technological progress on improving the landscape of aging services and creating a more supportive environment for both residents and the workforce.

Scott Code

VP, Center for Aging Services Technologies (CAST), LeadingAge

Scott Code is the Vice President of the Center for Aging Services Technologies (CAST) at LeadingAge with over 15 years of experience helping aging service providers strategically adopt and implement technology. CAST is leading the charge to expedite the development, evaluation and adoption of emerging technologies that can improve the aging experience. Scott has a master’s degree in both Gerontology and Business Administration, providing him with the unique ability to both evaluate and implement new technology across the care continuum.
CONCURRENT SESSIONS

**Wednesday, May 8 10:45am – 11:45am**

**Session: 1A**

**How One Organization is Making a Difference for Seniors Outside Their Walls Through Creative Partnerships**

Join us as we shine a spotlight on the partnership for Wellness Programming and Senior Health Assessments between The Sharon at SouthPark, UNC Charlotte, and Mecklenburg County Parks and Recreation. Discover how this innovative collaboration is making a significant impact on older adults in Charlotte, NC. Explore how senior living communities can amplify their impact by leveraging community benefit dollars and fostering creative partnerships to extend their mission beyond the confines of their own walls.

**Presenter(s):** Angela Rigsbee, The Sharon at SouthPark; Jessica Bourque, The Sharon at SouthPark; Trudy Moore-Harrison, UNC Charlotte

**Session: 1B**

**Demographics, Demand, Dollars & Design: The Next Chapter in Senior Living**

As we navigate construction costs, time pressures, scalability, capital market conditions, financial feasibility, and futuristic planning, the need for innovation and discipline will be challenged in the next chapter of senior living. Through case studies, this interactive session will dive into these forces and highlight key trends from a team of design and finance professionals, including IL Innovations, Realignment of the Care Continuum, Healthcare, Organizational Rightsizing, Data Validation, Heightened Expectations from Residents and Families, and Planning Beyond Boomers.

**Presenter(s):** Melissa Pritchard, SFCS, Inc.; Amy Taft, SFCS, Inc.; Tom Bowden, HJ Sims; Reed VanderSlik, ThriveMore

**Session: 1C**

**Intentional Professional Development Focused on Successor Readiness**

Join us for a session on intentional succession planning in nonprofit senior living. Learn from Givens Communities’ success in promoting 50 team members organization-wide in both 2022 and 2023. Led by a diverse leadership team spanning four generations, discover their process for identifying and advancing leaders, and how this investment in talent has driven success. Gain insights into Givens Communities’ strategies for talent acquisition, training, and professional development, which have proven successful in an industry challenged with attracting and retaining young leaders. Explore the importance of diversity, equity, inclusion, and belonging initiatives in recruitment and professional growth. Break away from the traditional focus on replacing outgoing leaders, and instead, embrace a strategy of development and growth for sustained success.

**Presenter(s):** Christian Grunder, Givens Communities; Kevin Schwab, Givens Communities; Kayla Welch, Givens Communities; Rob Dirscherl, Givens Communities

**Session: 1D**

**From Leisure to Wellness: Branching Out Beyond Bingo**

While activities programming is ubiquitous in retirement communities, wellness programming remains a rare gem, often reserved for assisted and independent living. Join us for a session that shines a spotlight on the pivotal role of wellness in long-term care settings. Discover how integrating wellness initiatives can enrich the existing care framework, combat functional declines, and revolutionize resident care delivery. Let’s explore how wellness not only enhances the quality of life but also expands the horizons of care provision, ensuring residents thrive in every aspect of their well-being.

**Presenter(s):** Jen Callahan, Functional Pathways; Dani Beveridge, Functional Pathways

**Wednesday, May 8 2:30pm – 3:30pm**

**Session: 2A**

**Planning the Expansion of a Life Plan Community**

Join us for an illuminating presentation that delves into the planning, design, and implementation of a campus expansion at Glenaire Retirement Community. Discover the intricacies of adding 192 Independent Living and 35 Memory Unit Health Services apartments to the existing Glenaire campus, with invaluable input from existing and future residents, dedicated staff, and the community board. Gain insight into the collaborative team effort that steered this project to successful completion, as we share the strategic approaches employed at every stage – from land acquisition and innovative design to seamless resident move-in and impactful community engagement.

**Presenter(s):** Mike Osman, Steele Group Architects; Tim Webster, Brightspire; Ben Stevens, Glenaire Retirement Community
Wednesday, May 8  2:30pm – 3:30pm

Session: 2B
Revolutionizing Senior Living Marketing with Generative AI: Attracting Residents in the Digital Age

Ready to discover the cutting-edge potential of generative AI? Join us for a session that explores how generative AI elevates the human element in marketing, crafting personalized experiences that revolutionize senior living marketing strategies. Dive into key points including a human-centric AI approach for empathetic communication, leveraging AI for enhanced efficiency and staff support, and advancing beyond basic AI applications to unlock deeper, more meaningful connections with your audience. Explore the transformative impact of data-driven segmentation for targeted outreach, and uncover strategies for maintaining ethical standards and infusing the human touch in AI-driven marketing initiatives.

Presenter(s): Scott Sweeney, ProviNET Solutions

Session: 2C
It Takes a Village: Understanding Concussion in Aging Services Programs

Concussions occur in all populations regardless of age, gender, or any other demographic. Falls are the most common cause of concussions, and as individuals age, multiple changes in the body can result in increased risk of falls. Join us to gain invaluable insights into effectively managing concussions in the aftermath of falls and explore the evolving guidance shaping concussion management in the days, weeks, and months post-injury. Additionally, explore groundbreaking research advancements in the utilization of saliva and blood-based biomarkers, promising a revolutionary future in concussion recognition.

Presenter(s): Terrence Carolan, CARF International

Wednesday, May 8  3:45pm – 4:45pm

Session: 3A
Unlocking Insights: Benchmarking for Strategic Growth and Performance Enhancement

Discover what benchmarking is and how it can benefit your community. Learn about the different types of benchmarks, as well as the benefits of comparing your data against like communities. Whether you are experiencing challenges with recruitment, retention, marketing, sales, occupancy, or the overall culture of your organization, benchmarking your employee and resident engagement survey results will provide extremely valuable insights as you create new strategic and marketing plans, recruit new staff and rise to meet the challenges in our field.

Presenter(s): Christine Fares Walley, Holleran Consulting; Katelyn McCauley, Holleran Consulting

Session: 3B
Effective Nursing Home Compliance Programs – New OIG Guidance

This session will provide an overview of key regulations and practices essential for establishing and sustaining an effective compliance and ethics program in skilled nursing facilities. We will discuss the anticipated revision of the 2008 memo by the Office of Inspector General (OIG), titled “OIG Supplemental Compliance Program Guidance for Nursing Facilities.” Our discussion will encompass any updates to the OIG memo and will outline key elements and practices outlined by both the OIG and the Centers for Medicare & Medicaid Services for building and maintaining a highly effective compliance program. Topics will include the significance of implementing a compliance program work plan and conducting an annual review process.

Presenter(s): Sean Fahey, Hall Render

Session: 3C
Workforce Development Strategies for the Digital Age

The senior living workforce uses technology more now than ever before, and their work experience is significantly impacted by the technology they need to use for their jobs. This session will introduce best practices to enhance and streamline employee recruiting and retention efforts. Attendees will learn about technologies that can enable employees to accomplish their ever-increasing responsibilities in a resource-constrained environment. They will also hear about ways technology can bolster change management efforts and streamline processes and workflows.

Presenter(s): Kim Speidel, Hartman Executive Advisors
Session: 3D

Synergies in Senior Living: Integrated Health + Wellness Models for Population Health

Join us for an interactive session delving into the evolving world of senior living. Discover how innovative integrated health, wellness, and lifestyle models are revolutionizing experiences for older adults. Gain actionable insights into the dynamic convergence of hospitality and clinical approaches, which are redefining standards of care and wellness in senior communities. Learn how to seamlessly integrate clinical health and wellness care with hospitality services for enhanced resident experiences.

Presenter(s): Kristi Smith, HealthPRO Heritage

Thursday, May 9  11:15am - 12:15pm

Session: 4A

The Devil is in the Details

Details matter as LPCs strive for the best ROI from renovation projects! This doesn’t mean obsessing over the perfect paint shade, but rather making the right decisions about lighting, acoustical and heating/ventilation/air-conditioning systems – all of which make a big difference in how residents experience space. Let’s face it, no matter how beautiful a space is, if the lighting is too dim, the room too chilly, or there is too much background noise, the resident experience is greatly diminished! Join this team of design experts to find out how to get your details right for better ROI!

Presenter(s): Eric Endres, RLPS Architects; James Hackman, Reese, Hackman, Inc.; Seth Harrison, Harrison Acoustics

Session: 4B

Brick by Brick: Building Purpose through Partnerships

Exploring Deerfield’s innovative approach to affordable housing through impactful partnerships, we will hear resident, volunteer, and philanthropic perspectives on creating aging in place homes with Asheville Area Habitat for Humanity. Follow the journey from ideation to construction of a home internationally recognized for design and accessibility. Hear from key stakeholders about the initiative’s life-changing impact. Gain insights into tangible outcomes to uplift the local community, expanding Deerfield Charitable Foundation’s support of a rapidly growing aging population.

Presenter(s): Libby Bush, Deerfield Episcopal Retirement Community; Michelle Wooley, Deerfield Episcopal Retirement Community; Tim Kurtz, Andy Barnett, Habitat for Humanity – Asheville

Session: 4C

Whole-Person Health is Here to Stay

Get ready for an engaging discussion on Whole Person Health, which delves into the four dimensions of well-being: mental health, financial, physical, and social. This session is designed to equip employers with strategies to adopt a holistic approach to employee wellness, enhancing overall workforce health and productivity. Join us for an insightful exploration of how prioritizing employee well-being leads to a more resilient and thriving workplace.

Presenter(s): Wes Bartlett, Marsh McLennan Agency; Bobbie Victory, Marsh McLennan Agency

Session: 4D

Improve Census and Margins with the Six Ps

Marketability and high occupancy in today’s competitive senior housing market can be boiled down into the six Ps: Place (the external market), Price (monthly service fees and entrance fees and how those compare to the competition), Product (physical plant and amenity and service offerings), Promotion (marketing and sales), Performance (operations), and Planning (financial strategy for phasing improvements and strengthening the organization for growth). In this session, we’ll recount inspiring stories of how communities addressed one or more of the six Ps in developing strategic repositioning.

Presenter(s): Rob Love, Love & Company, Inc.; Sara Montalto, Love & Company; Sally Heffernan, Plante Moran Living Forward; Greg Hensley, Plante Moran Living Forward
Thursday, May 9  2:15pm – 3:15pm

**Session: 5A**

**BellaAge: Meeting the Middle Market Need**

Dive into the journey of planning and developing a middle market project in the “Furniture Capital of the World.” Join us as presenters take you through the process of site selection, sharing valuable insights into the advantages of partnering with a local general contractor. Discover the driving forces behind the project’s economics and get inspired by the innovative strategies that fueled its success. Don’t miss out on this session filled with valuable lessons and insider tips!

**Presenter(s):** Jake Slavik, Sawgrass Partners; Lee Syria, EveryAge; Tommy Brewer, Ziegler

**Session: 5B**

**An Expansion Sales Case Study: The Forest at Duke’s Tech-Enabled, Personalized Approach**

The Forest at Duke embarked on a major, multiphase expansion to revolutionize healthcare offerings and incorporate a new independent living option called The Terraces with 71 luxury apartments. The community began a Charter Membership priority program in January of 2022. Construction is on pace for a Spring 2025 move-in date. To ensure success, The Forest used several tech-enabled sales tools to guide prospects through a personalized sales experience throughout the process. This presentation will provide a case study of what we did well and what we could have done better.

**Presenter(s):** Hoyle Koontz, The Vectre LLC; April Ravelli, The Forest at Duke; Suzanne Allen, BlueFingerprint

**Session: 5C**

**Overtime, Burnout, Turnover... Oh my! Beat Burnout, Tackle Turnover, and Obliterate Overtime**

Are you struggling to retain caregivers amidst rising turnover rates? The exodus of overworked and fatigued staff to other fields or communities with standard operating schedules is draining your resources and impacting work culture. Backfilling these positions not only consumes time and money but also undermines efforts to foster a positive work environment for caregivers and ensure resident satisfaction. The cycle of overworking full-time staff not only fosters burnout but also poses increased risks to your community and residents. Join us to explore strategies for employee retention and building a sustainable, thriving work culture.

**Presenter(s):** Evan Kuo, KARE

Thursday, May 9  3:30pm – 4:30pm

**Session: 6A**

**The Bonds Have Been Issued—Now What? Reporting Considerations for Bond Financed Projects**

The fun isn’t over yet! A tax-exempt bond financing to expand or renovate your facility is the gift that keeps on giving for many years. This session will focus on various reporting requirements that are typically involved in a tax-exempt bond financing and will bring together three different perspectives in one presentation to provide practical advice and tips for how to comply with reporting requirements such as IRS forms, securities law annual and event notice reporting, other financial reporting requirements dictated by investors and construction progress reporting.

**Presenter(s):** Alice Adams, Robinson, Bradshaw & Hinson, P.A.; Kenda Laughery, Southminster Retirement Community; Rob Milam, zumBrunnen, Inc.

**Session: 6B**

**Work–Life Integration In Aging Services**

Delve into the concept of work–life integration and explore its nuances compared to traditional work–life balance. This session will equip team members with practical strategies to seamlessly incorporate work–life integration into their daily routines. Discover how integration fosters a harmonious blend of work and non-work activities, enabling individuals to maintain control and make choices that effectively navigate life’s challenges. Say goodbye to the struggle of sacrificing one area for the other and embrace a holistic approach that empowers you to achieve balance while thriving in both your personal and professional life.

**Presenter(s):** Milton McGowian, The Sharon at SouthPark
IN-PERSON REGISTRATION

3 WAYS TO REGISTER BY APRIL 21, 2024

Checks should be made payable to “LeadingAge North Carolina”

1) COMPLETE ONLINE, www.LeadingAgeNC.org. Please login to receive member rates. – OR –
2) FAX the forms 919.869.1811 –OR– 3) MAIL with payment to: LeadingAge NC, PO Box 27527, Raleigh, NC 27611.

PLEASE DO NOT EMAIL REGISTRATION FORMS

STEP 1: CONTACT INFORMATION

Attendee Type:  ☐ Provider  ☐ Non Provider  ☐ Speaker  ☐ NC Leadership Academy Alumni

Attendee First and Last Name  ___________________________________________________________

Title:  ___________________________________________  Organization:  _______________________________________

Mailing Address:  ____________________________________________________________

City:  ___________________________________________  State:  __________________________  Zip:  __________

Telephone:  (______)  ___________________  Email:  ___________________________________________

NHA NC License #:  ___________________________  NAB Registry ID #:  ___________________________  CPA License #:  ___________________________

☐ Check here if HR Recertification Credit is needed  ☐ Check here if Certificate of Completion is needed

Emergency Contact Name:  ___________________________________________  Mobile #:  ___________________________

STEP 2: PLEASE CHECK THE FOLLOWING IF THEY APPLY  (All included with full registration.)

☐ I plan to attend the Leaders of Color and Allies Coffee and Conversation on Wednesday, May 8 at 8:00am

☐ I am a President/CEO/ED of a Member Life Plan Community and will attend the Leadership Breakfast on Thursday, May 9 at 8:00am

I plan to attend the following meals/events:

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<th>Day</th>
<th>Tuesday, May 7</th>
<th>Wednesday, May 8</th>
<th>Thursday, May 9</th>
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<td>Welcome Reception</td>
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</tbody>
</table>

STEP 3: CIRCLE EDUCATION SESSIONS (Virtual Sessions are included with In-Person Registration)

<table>
<thead>
<tr>
<th>Wednesday, May 8</th>
<th>9:00am - 10:30am</th>
<th>Opening Session: Pete Smith</th>
</tr>
</thead>
<tbody>
<tr>
<td>9:45am - 11:45am</td>
<td></td>
<td>1A</td>
</tr>
<tr>
<td>2:30pm - 4:30pm</td>
<td>Deep Dive: State of LTC and Alternative Revenue Streams</td>
<td></td>
</tr>
<tr>
<td>2:30pm - 3:30pm</td>
<td>2A</td>
<td>2B</td>
</tr>
<tr>
<td>3:45pm - 4:45pm</td>
<td>3A</td>
<td>3B</td>
</tr>
<tr>
<td>9:30am - 11:00am</td>
<td>Showcase 2024</td>
<td></td>
</tr>
<tr>
<td>11:15am - 12:15pm</td>
<td>Deep Dive: Regulatory Update</td>
<td></td>
</tr>
<tr>
<td>11:15am - 12:15pm</td>
<td>4A</td>
<td>4B</td>
</tr>
<tr>
<td>2:15pm - 3:15pm</td>
<td>Deep Dive: Navigating Change No Matter Who You Are</td>
<td></td>
</tr>
<tr>
<td>2:15pm - 3:15pm</td>
<td>5A</td>
<td>5B</td>
</tr>
<tr>
<td>3:30pm - 4:30pm</td>
<td>Deep Dive: Recognize, Respond, Survive</td>
<td></td>
</tr>
<tr>
<td>3:30pm - 4:30pm</td>
<td>6A</td>
<td>6B</td>
</tr>
<tr>
<td>Friday, May 10</td>
<td>9:00am - 11:00am</td>
<td>Closing Breakfast Session: Scott Code</td>
</tr>
</tbody>
</table>
### STEP 4: CALCULATE REGISTRATION FEES

#### A  FULL CONFERENCE

Fees include in-person and virtual educational sessions and admission to all meals and events.

<table>
<thead>
<tr>
<th>Category</th>
<th>Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>Community/Provider Member</td>
<td>$780</td>
</tr>
<tr>
<td>Member Community Board of Directors</td>
<td>$350</td>
</tr>
<tr>
<td>NC Leadership Academy Alum</td>
<td>$500</td>
</tr>
<tr>
<td>Concurrent Session Speaker</td>
<td>$500</td>
</tr>
<tr>
<td>Non-Member Community/Provider</td>
<td>$990</td>
</tr>
<tr>
<td>Non-Exhibiting Business Member</td>
<td>$990</td>
</tr>
<tr>
<td>Non-Exhibiting Non-Member Business</td>
<td>$1,370</td>
</tr>
</tbody>
</table>

**Section A Total** $ 

Guest Pass for spouse/partner $200 accompanying full registration for Member Communities Only. Contact LeadingAge NC for approval.

#### B  DAILY REGISTRATION

<table>
<thead>
<tr>
<th>Day</th>
<th>Category</th>
<th>Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Wednesday</strong></td>
<td>Community/Provider Member (Includes Welcome Reception, Educational Sessions, Meals, and Expo)</td>
<td>$500</td>
</tr>
<tr>
<td></td>
<td>Member Community Board of Directors</td>
<td>$170</td>
</tr>
<tr>
<td></td>
<td>Non-Member (Community/Provider)</td>
<td>$670</td>
</tr>
<tr>
<td></td>
<td>Non-Exhibiting Business Member</td>
<td>$670</td>
</tr>
<tr>
<td></td>
<td>Non-Exhibiting Non-Member Business</td>
<td>$830</td>
</tr>
<tr>
<td><strong>Thursday</strong></td>
<td>Community/Provider Member (Includes Educational Sessions, Meals and Closing Breakfast Session)</td>
<td>$500</td>
</tr>
<tr>
<td></td>
<td>Member Community Board of Directors</td>
<td>$170</td>
</tr>
<tr>
<td></td>
<td>Non-Member (Community/Provider)</td>
<td>$670</td>
</tr>
<tr>
<td></td>
<td>Non-Exhibiting Business Member</td>
<td>$670</td>
</tr>
<tr>
<td></td>
<td>Non-Exhibiting Non-Member Business</td>
<td>$830</td>
</tr>
</tbody>
</table>

**Section B Total** $ 

#### TOTAL REGISTRATION FEES

**TOTAL ENCLOSED** $ 

Charge to:  
- [ ] Visa  
- [ ] Master Card  
- [ ] Discover  
- [ ] American Express  

Credit Card Number: ________________________________ Security Code: _________ Exp. Date: ___________

Card Holder name: ____________________________________________

Signature of Card Holder: ______________________________________

Billing Address: ________________________________________________

City/State/Zip: __________________________ Telephone: ____________________
3 WAYS TO REGISTER BY APRIL 21, 2024
Checks should be made payable to “LeadingAge North Carolina”

1) COMPLETE ONLINE, www.LeadingAgeNC.org. Please login to receive member rates. - OR -
2) FAX the forms 919.869.1811. - OR -
3) MAIL with payment to: LeadingAge NC, PO Box 27527, Raleigh, NC 27611.

PLEASE DO NOT EMAIL REGISTRATION FORMS

STEP 1: CONTACT INFORMATION - VIRTUAL ATTENDEE

Attendee First and Last Name ________________________________________________________________
Title: ________________________________________________________________________________
Organization: _________________________________________________________________________
Mailing Address: ______________________________________________________________________
City: _________________________________________________________________________________
State: __________________ Zip: ______________________________________________________________________
Telephone: (______)_________________ Email: ______________________________________________________________________
NHA NC License #: __________________ NAB Registry ID #: __________________ CPA License #: __________________
☐ Check here if HR Recertification Credit is needed ☐ Check here if Certificate of Completion is needed

STEP 2: CIRCLE EDUCATION SESSIONS

Wednesday, May 8
9:00am - 10:30am Opening Session: Pete Smith
2:30pm - 4:30pm Deep Dive: State of LTC and Alternative Revenue Streams

Thursday, May 9
9:30am - 11:00am Showcase 2024
11:15am - 12:15pm Deep Dive: Regulatory Update
2:15pm - 3:15pm Deep Dive: Navigating Change No Matter Who You Are
3:30pm - 4:30 pm Deep Dive: Recognize, Respond, Survive

Friday, May 10
9:00am -11:00am Closing Breakfast Session: Scott Code

STEP 3: REGISTRATION FEES

<table>
<thead>
<tr>
<th>Category</th>
<th>Total Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>Provider Member</td>
<td>$500</td>
</tr>
<tr>
<td>Member Community Board Member or Resident</td>
<td>$170</td>
</tr>
<tr>
<td>NC Leadership Academy Alumni</td>
<td>$500</td>
</tr>
<tr>
<td>Concurrent Session Speaker</td>
<td>$0</td>
</tr>
<tr>
<td>Non-Member Provider</td>
<td>$670</td>
</tr>
<tr>
<td>Non-Exhibiting Business Member</td>
<td>$670</td>
</tr>
<tr>
<td>Non-Exhibiting Non-Member Business Firm</td>
<td>$830</td>
</tr>
</tbody>
</table>

Charge to: ☐ Visa ☐ Master Card ☐ Discover ☐ American Express
Credit Card Number: __________________________________________ Security Code: ________ Exp. Date: ________
Card Holder name: __________________________________________________________________________
Signature of Card Holder: ____________________________
Billing Address: __________________________________________________________________________
City/State/Zip: __________________________ Telephone: __________________________
Schedule of Events

Tuesday, May 7

9:00am  Tee Times Start (Details regarding tee times will be provided closer to the event date).
5:00   Welcome Reception

REGISTRATION

Whether you’re an avid golfer or someone who only visits a course once each year, this four-person scramble is designed so everyone can enjoy the day. Registration is open to all staff of LeadingAge North Carolina Community and Business Members. Community Members and Platinum Business Members can register individually or as a team of up to four (4) players. Silver and Bronze Business Members must register one Community Member representative per Business Member representative. Please use one registration form per foursome. Contact Leslie.Roseboro@LeadingAgeNC.org or call the LeadingAge NC office at 919.571.8333 for further information.

Registration: $200/person

Name: ___________________________ Organization: ___________________________ Email: ___________________________

Name: ___________________________ Organization: ___________________________ Email: ___________________________

Name: ___________________________ Organization: ___________________________ Email: ___________________________

Name: ___________________________ Organization: ___________________________ Email: ___________________________

NOTES: __________________________________________________________________________________________

Registering yourself or a full team

Individuals or groups of two will be paired into a foursome by the LeadingAge North Carolina Golf Planning Committee; we’re sure you’ll enjoy your team! If you’re registering more than just yourself, please only register people with their approval. Golf, cart, and boxed lunch are included in the registration fee.

______Total number of tickets X $200 = $____________ Total amount enclosed

Charge to:  □ Visa  □ Master Card  □ Discover  □ American Express

Credit Card Number: ___________________________ Security Code: _________ Exp. Date: __________

Card Holder name: ____________________________________________________________

Signature of Card Holder: _____________________________________________________

Billing Address: _____________________________________________________________
City/State/Zip: __________________________________________ Telephone: __________________________

Registration deadline April 21
No refunds after April 12

SPONSORSHIP OPPORTUNITIES  Business Members Only

General:
______$2,000 Boxed Lunch (1 available)
______$2,000 Refreshment Station (1 available)

Skill/Course  (Provide Prize):
______1st Place Team  (4 prizes)
______Closest to Pin Men and Women Combined  (2 prizes)
______Long Drive Men and Women  (2 prizes)