2017 ANNUAL LEADERSHIP CONFERENCE

Austin, Texas • October 8–11
Renaissance Austin Hotel

Our Home Care Landscape
BIG CHALLENGES • BIGGER OPPORTUNITIES
Welcome

Our Home Care Landscape:
Big Challenges, Bigger Opportunities

As the premier association representing the home care industry, the Home Care Association of America (HCAOA), is committed to connecting and educating our members. We stay on top of the latest issues, have our finger on the pulse of future trends and keep our member companies informed. Whether providing training on the latest business strategies, technology or hosting our dynamic annual leadership conference, HCAOA enables our members to grow, advance workers’ skills and meet the needs of America’s seniors.

The 2017 HCAOA Annual Leadership Conference will take place in Austin, Texas, October 8-11. The HCAOA is encouraging home care providers to attend the conference this year with the theme Our Home Care Landscape: Big Challenges, Bigger Opportunities. Attendees will be immersed in the latest home care innovations, business strategies, practices and methods throughout the conference. They will also have the opportunity to learn from industry leaders in a keynote address, general sessions and expert breakout sessions on a range of must-see topics including:

- Sales/Marketing
- Operations
- Technology
- Best Practices

Throughout the conference, leading vendors will be exhibiting their latest offerings supporting home 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

The 2017 Annual Leadership Conference will be held at the Renaissance Austin Hotel in Austin, TX. As the capital of Texas, it is the home of the University of Texas at Austin® and gateway to the beautiful Hill Country. As the Live Music Capital of the World®, the city has a soundtrack all its own. More than 250 live music venues flourish with rock, indie, pop and Tejano. Top notch restaurants with legendary barbeque and farm-to-table cuisine whet your appetite. Shop in one-of-a-kind boutiques that line South Congress and the 2nd Street district, or head out to the Hill Country to relax in a world class destination spa. More than 300 days of sunshine lend itself to a refreshing dip in Barton Springs or try stand-up paddle boarding on Lady Bird Lake.

HCAOA has secured an outstanding rate of $192 plus tax per night from the Renaissance Austin Hotel. Reservations can be made by calling 1-800-468-3571.

Please book accommodations by September 15, 2017 and mention that you are an attendee of the HCAOA Annual Leadership Conference to ensure you receive our discounted rate.
Like you, Walter Bond knows what it’s like to be discounted by everyone around you, to run up against challenges that feel insurmountable, and to have moments where winning is challenging. But then Walter recognizes a single truth that changed everything. Peak performers have no excuses for failure; only reasons for success.

After several stellar high-school seasons, Walters earned a scholarship on the University of Minnesota basketball team. As an average college player who was overlooked by the NBA, Walter tapped into a peak performance mindset, changed his work ethic and found himself as a professional NBA basketball player for the Dallas Mavericks.

Now retired from the NBA, Walter Bond shares stories, lessons, and the type of motivation that sparks the superstars to success and moves the middle players into action.

Global Franchise Magazine has named Walter Bond to its “Top 20 Keynote Speaker” list. Bond is “an undoubted star of the speaker circuit,” according to the magazine, noting that “his mastery of two different global industries has made him an authority on peak performance. He has delivered his entertaining and dynamic message to companies and associations throughout the United States, Canada, Mexico, the Caribbean and Europe.”

When Walter is on the platform you will have the knowledge and skills needed to take the proven path away from the pack and into the peak performer’s spotlight.

Recognizing Challenges, Seizing Opportunities

Walter Bond has the secret. As a former NBA professional from the South Side of Chicago, Walter has discovered what it takes to recognize challenges, get mentally tough, and seize opportunities to perform competitively at the highest level.

In this powerfully motivating program you will discover how to overcome industry challenges and seize opportunities to reach your highest potential, the secret sauce that makes peak performers exceptional and the one thing that matters most to you and everyone around you.
General Sessions

Aaron Marcum, Founder, Home Care Pulse

5 Key Strategies to a Self-Managed Home Care Company

Aaron Marcum, Founder and CEO of the leading satisfaction management and performance benchmarking firm, will explore five key strategies that can help you get your company on a path of growth while still providing you a fulfilling life outside of your business. Aaron has successfully implemented these five strategies as a former home care owner and now at Home Care Pulse. Attendees will walk away with proven ideas and strategies used by him and other successful Self-Managed companies, plus a free tool designed to help them set their own course towards building their own Self-Managed Home Care Company.

Andrea Cohen, CEO and Co-founder, HouseWorks

Technology 2.0: It’s Doable. It’s NOW.

By incorporating a technology strategy that is affordable, executable and adds value, home care companies are positioned to be the ‘post-acute connector.’ The integration of high-touch service and technology makes this possible. Imagine a home care company where clients are engaged in their own care, families have tools to make informed decisions, in-home care workers more actively participate in the care, and administrators use data to guide clinical decision-making. This session discusses how owners and operators are successfully incorporating technology into their businesses—highlighting the opportunities, challenges and best practices. The big question has become: how much of a role can technology ultimately assume?

Patrick Cooney, President, The Federal Group, Inc.

HCAOA Public Policy Update: State & Federal Efforts

Patrick Cooney, HCAOA’s Federal Legislative Consultant, will review HCAOA’s progress on key health, tax, and labor issues facing the home care industry at both the state and federal level. Learn how you can become an active advocate in your own state and ways to build relationships with policy makers.
Breakout Sessions

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**Breakout Sessions**

**How to Build Caregiving Experts**

The fact is that the business of care is getting more and more competitive. Whether you are publicly or private funded, how you stand out and differentiate yourself from your competitors is important. Your biggest assets are your people. You need to consider how to build not only the best employees to provide the highest quality of care, but how to develop caregiving experts. These experts will not only ensure you retain the best staff, but are also providing the defined career path with the highest quality of care. Attendees will learn how an effective training program can boost retention, the importance of establishing your team as experts and how to create micro-ladders for career progression.

Sharon Brothers
CEO, Founder, Institute for Professional Care Education

**Legal Tips for Documenting Your Firing Decisions**

Firing employees is not only emotionally unpleasant, but also legally risky. While there is no way to guarantee that a fired employee will not sue, having a well-documented, fact-based decision will go a long way in fending off a lengthy and costly legal action. Critical documentation for an employee’s termination of employment includes the employee’s past performance reviews and all other written disciplinary warnings, as well as your documentation for the incidents that led to your firing decision. This breakout session will first review employees’ legally protected activities and rights in the workplace, and how these rights may impact your firing decisions. It will then look at typical reasons for firing problem employees and how to build helpful and consistent documentation to support your firing decisions.

Eileen Maguire
Attorney, Gilliland, Maguire & Harper PC

**How Claims Data Can Illuminate Healthcare Trends Affecting Home Care**

Home care is part of a broader health care continuum, and information about other parts of that continuum can lead to greater success for a home care business. Drawing on the nation’s largest repository of health care claims data, this session will spotlight the trends in the health care landscape that are most relevant to home care providers. Those include changes in utilization of home health services, telehealth, hospitals and post-acute care facilities; geographic and demographic factors; and clinical patterns, such as increasing and decreasing diagnoses and procedures related to home health and post-acute care. Cost trends will be analyzed, including billed charges and allowed amounts. Using billions of health care claims as a window into the home care market and related venues, particularly when the claims data are specific to a home care provider’s geographic area, proves vital to making strategic decisions about partnerships, affiliations, expansion or contraction; improving referral streams; and more.

Robin Gelburd
President, FAIR Health

**Your Legal Update 2017, Surviving U.S. Department of Labor Audits and Q&A**

This informative session will provide a comprehensive federal legal update for 2017 and beyond in home care laws. Additionally, as the U.S. Department of Labor (DOL) continues to target home care agencies, this session will provide tips on surviving—and winning—a DOL audit. This is a very interactive program intended to discuss a wide range of topics. Attendees are encouraged to bring questions about any federal employment law issue to be addressed during this presentation.

Bob King
Attorney and Founder, Legally Nanny

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“Stop Selling...and Start Serving!”

For most people, “salesperson” conjures up images of gold chains, bad toupees, and running for the nearest exit. And yet if there is one thing we all do every day...it’s sell. Ideas, services, employment, partnerships...we are constantly enrolling ourselves and each other every day. Plus, in the fragmented market of home care, many sales teams find themselves ragged from the rat race and desperate to outsmart the competition. But what if there were a better way? Drawing from real-world experience, and the work of Simon Sinek, Seth Godin, and others, this dynamic and interactive session will provide ideas and practical tools to shift participants out of their greatest fear (selling) and into their highest calling (serving).

Paul Jones
President & Chief Relationship Officer, FirstLight Home Care of Woodbridge

Danielle Canton
Executive Director of Brand Development, FirstLight Home Care

Lessons for the Seller or Buyer of A Home Care Agency

Some are considering the opportunity to grow their home care agency through acquisition, while others are those considering the opportunity to divest their agency. There is a market for both parties and some pitfalls to watch for on both sides. This session will discuss some of the important lessons for both parties which will help either be more successful should you consider being party to a transaction. First, key takeaways on what to watch out for on the buyer side will be followed by the key takeaways from the seller side.

Jeff Wiberg
CEO, Family Home Care

Breakout Sessions

Scott Osborne
Founding Principal, Osborne HomeCare Group


This session provides critical information about private equity investor’s recent and rapid entry into the home care market, creating existing and future opportunities for exit oriented owners. Attendees will come away with an understanding of the key components and elevated importance of Strategic Succession Planning in optimizing owner’s exit paydays by appealing to existing and emerging financial and strategic buyers. Home care firms aren’t sold, they’re bought. Scott Osborne will bring owners to the front lines of his courtship of multiple home care buyers across the country. Attendees will come away from this session with a unique perspective of “investment value” through understanding how financial and strategic buyers quantify earnings, qualify acquisition risk and structure deals.

Kunu Kaushal
Founder & CEO, Senior Solutions Home Care

Lessons Learned by a Founder: Building From 0 to $8 Million in Seven Years

Receive lessons learned from an owner who now manages a successful multi-million dollar business. Understand how he grew his agency to be one of the largest and most recognized brands in the state. He’ll share how he manages to retain caregivers, leverages new technology and has found efficiencies for running a lean business. Learn how he staffs his administrative office, how to deal with rising call volumes through technology and other processes, how to choose a software system and how to scale your business through acquisitions and through organic growth.

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Financial Leadership in a Home Care Agency

This session will review financial tools for the home care owner. The session will also review weekly, monthly, quarterly, annual reviews and projections. It will also cover profitability vs cash-flow as well as what to look for in an accountant.

Balanced Scorecard for Home Care Agencies

The Balance Scorecard presentation will provide owners and operational directors a balanced approach to overall organizational success by incorporating and mapping four key components with the ability to link them in a manner that will enhance efficiency with existing resources. This format also provides the ability to provide a visual to communicate the mission, vision and values to not only to your current team but also during the onboarding process.

When creating this model, you will also have the ability to identify where your organization is deficient. All organizations possess these four components but the trick is to link them in a way that creates resource efficiency which in turn will provide improved organizational success.

Best Practices for Boosting Your Online Reputation

Consumers are increasingly basing their buying decisions on online reviews. According to recent research, 92% of consumers read online reviews and 68% of consumers say that positive reviews make them trust a business more. Additionally, 94% of consumers will consider purchasing from a business if they have at least a 4-star rating; this drops to 57% for a 3-star rating. Given the highly personal nature of in-home senior care, a consumer considering in-home care for a loved one is even more likely to base their decision based on unbiased feedback on review sites like Google, Yelp, Caring.com, and others. This presentation will offer best practices and insights on how to better engage with customers, how to generate more positive reviews, and how to diminish the impact of negative reviews or avoid them altogether.

Niche Attack: Creating Business Opportunities Through Specialization

The home care climate is tricky these days. We all think we have the best caregivers, or service, or quality. But let’s face it, standing out in today’s marketplace can be difficult. Consumers have a difficult time understanding the differences between agencies. Creating a market niche doesn’t have to be hard, but it can really make your agency stand out among the rest.
The Role of HCAOA Chapters: Tools & Resources To Achieve Success

State chapters serve as the front lines of the home care industry and as the sentinel for HCAOA in those respective states. This session will focus on the available tools and resources that have been developed to support HCAOA State chapters. In addition, participants will have the opportunity to discuss chapter successes, learn best practices and network with chapter leaders. Join HCAOA staff in this informative session geared towards those interested in serving in a leadership role in their respective state chapter as well as those interested in starting a state chapter.

When Passion Turns To Poison: Training Staff to Understand Staff Burnout

The helping profession is highly susceptible to burnout. Home care providers work tirelessly to serve their clients and cannot recognize when their passionate energy starts to breakdown and affect their job performance and the care they provide. As home care business owners, it is crucial to understand the effects of staff burnout and to be able to train your management staff on how to address the issue while maintaining staff morale. During this session, we will discuss how to train management staff to recognize staff burnout, how to effectively address the issue considering staff behavior styles, and still maintain a positive work environment.

Retaining Hourly Wage Employees: Engagement Strategies That Work

The purpose of this session is to enable the learner to better understand the complexities associated with hourly attrition, embrace current research findings on the topic and exit the session with evidence-based strategies to decrease hourly employee attrition by improving engagement. Presented by both a business owner and a manager, the unique presentation blends the leadership and operational roles together, showing how to create and then implement winning strategies across any company.
**Breakout Sessions**

- **John Hedrick**
  Martha’s Hands

- **Patricia Rodgers**
  Waverly Care Associates

- **Bob Roth**
  Cypress HomeCare

- **Douglas Wilber**
  Cherished Companions Homecare

- **Jeff Wiberg**
  Family Home Care

**Best Practices Sharing for Care Giver Training and Retention**

Attend this session to learn proven techniques that will lead to new ideas for training your caregiver staff as well as new ideas for employee retention. A panel of five agency owners will share their own proven techniques and experiences on the front lines of their businesses. The audience will have opportunities to ask questions and “pick the brains” of some of the best and brightest in our industry. This will be a great hands-on breakout session that will give new or experienced operators new ideas that have proven successful in companies similar to your own.
Schedule

Sunday, October 8
2:00pm – 5:00pm  Registration Open

Monday, October 9
8:00am – 9:00am  Breakfast (Exhibit Hall)/Registration Open
9:00am – 10:30am  Welcome & Keynote Address
10:30am – 11:00am  AM Break (Exhibit Hall)
11:00am – 12:15pm  Breakout Sessions
12:30pm – 1:30pm  Lunch
1:45pm – 3:00pm  Breakout Sessions
3:00pm – 3:30pm  PM Break (Exhibit Hall)
3:30pm – 4:45pm  HCAOA Public Policy Update: State & Federal Efforts
5:00pm – 7:00pm  Opening Reception (Exhibit Hall)

Tuesday, October 10
8:00am – 9:00am  Breakfast (Exhibit Hall)
9:00am – 10:30am  General Session – Technology Showcase: Technology 2.0: It’s Doable. It’s NOW
10:30am – 11:00am  Beverage Break (Exhibit Hall)
11:00am – 12:15pm  Breakout Sessions – Technology Showcase
12:15pm – 2:30pm  HCAOA Business Meeting & Luncheon
2:30pm – 3:30pm  Beverage Break (Exhibit Hall)
3:45pm – 5:00pm  Breakout Sessions

Wednesday, October 11
8:00am – 9:00am  Breakfast
9:00am – 10:15am  Breakout Sessions
10:15am – 10:30am  Beverage Break
10:30am – 11:45am  General Session: 5 Key Strategies to a Self-Managed Home Care Company
11:45am – 12:00pm  Closing Comments, Prizes – Grab & Go Lunch

REGISTRATION

 Until August 11th
Member: $1,050
Non-Member: $1,450

After August 11th
Member: $1,150
Non-Member: $1,550

You can register today online at www.hcaoa.org. For hotel accommodations at the Austin Renaissance Hotel, please call 1-800-468-3571. Mention HCAOA Annual Leadership Conference for special $192 per night guest room rate.
HCAOA members serve nearly 400,000 seniors and people with disabilities.

HCAOA members employ more than 500,000 caregivers.

HCAOA caregivers provide nearly 1 million hours of care per day.

HCAOA members pay more than $4.8 billion in payroll to employees.

JOIN THE HCAOA TODAY!
Visit www.hcaoa.org

The Home Care Association of America (HCAOA) represents over 2,500 companies, and sets the standard for providing high quality home care.

HCAOA represents the industry’s interests in Washington, DC and in state capitals across the United States, promotes the value of home care while advancing the industry, and connects and educates its members. HCAOA stays on top of the issues and keeps its members informed—whether providing training on the latest business strategies or technology or hosting its dynamic annual leadership conference on today’s cutting-edge issues. HCAOA enables home care companies to grow, advance caregiver skills and meet the needs of America’s seniors.

HCAOA Member Benefits Include:

- Discounted rates for HCAOA Annual Leadership Conference
- Access to printable public awareness materials for consumers and policymakers
- Access to the Caring for America’s Seniors: Value of Home Care report, the first report of its kind defining home care and its importance, backed by data from trusted sources
- Information and resources via timely newsletters
- Access to critical legislative/regulatory information
- Company's listing on the HCAOA home care provider locator service
- Education discounts for entire staff for HCAOA hosted educational offering/webinars
- Access to special home care provider features on the association website
- Purchasing discount program
- Access to local chapters, where applicable
- Eligible to vote and volunteer for a leadership role in HCAOA to help set the direction and focus of the association
- Membership certificate and window decal recognizing HCAOA membership
- Use of the HCAOA logo for company’s marketing materials