

State Long-Term Care Ombudsman Conference

2024 AGENDA

Monday, April 22

8:45am – 5:00pm	Registration (<i>West Promenade</i>)
9:00am – 12:00pm	NASOP Committees (<i>Crystal A-B</i>)
12:00pm – 1:30pm	Lunch on Your Own
1:30pm – 5:00pm	NASOP Membership Meeting (<i>Crystal A-B</i>)
1:30pm – 5:00pm	State Staff Session (<i>Continental</i>)

*Speakers: **Katie O’Hearn**, Program and Outreach Manager, NORC; **Beverley Laubert**, National Ombudsman Program Coordinator, Administration for Community Living (ACL); **Amity Overall-Laib**, Director, NORC; **Carol Scott**, LTC Ombudsman Program & Policy Manager, NORC; **Alexa Schoeman**, Deputy State Ombudsman, Texas; **Erica Nunn**, Assisted Living Ombudsman, Texas.*

Tuesday, April 23

8:00am – 5:00pm	Registration (<i>West Promenade</i>)
7:30am – 8:00am	New State Ombudsman Breakfast (<i>Crystal A-B</i>)
8:00am – 12:00pm	New State Ombudsman Orientation (<i>Crystal A-B</i>)

*Speakers: **Carol Scott**, LTC Ombudsman Program & Policy Manager, NORC; **Lori Smetanka**, Executive Director, Consumer Voice; **Amity Overall-Laib**, Director, NORC; **Katie O’Hearn**, Program and Outreach Manager, NORC; **Beverley Laubert**, National Ombudsman Program Coordinator, ACL; **Jocelyn Bogdan**, Senior Program & Policy Specialist, Consumer Voice; **Kristin Helfer Koester**, Medicare Program Associate, ADvancing States; **Stephanie Wheeler**, Alaska State Long-Term Care Ombudsman*

10:00am – 12:00pm	Dialogue for Experienced State Ombudsmen (<i>Citizens A-B</i>)
10:00am – 12:00pm	Dialogue for State Staff (<i>Continental</i>)
12:00pm – 1:30pm	Lunch on Your Own
1:30pm – 2:00pm	Welcome, Introductions, Opening Remarks (<i>Crystal A-B</i>)

2:00pm – 3:30pm	Understanding the Value of the State Operations Manual (SOM) in Ombudsman Program Advocacy (<i>Crystal A-B</i>)
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This session will explore how to use the SOM in advocating for change. While the document is written for state survey agencies, the Long-Term Care Ombudsman Program (LTCOP) can effectively use the information to inform conversations with surveyors, during complaint investigations, and systems advocacy. The speakers will provide an overview of the entire SOM and take a deep dive into Appendix PP.

*Speakers: **Evan Shulman**, Director, Division of Nursing Homes, Centers for Medicare & Medicaid Services (CMS); **Lori Smetanka**, Executive Director, Consumer Voice; **Beverley Laubert**, National Ombudsman Program Coordinator, ACL*

3:30pm – 4:00pm

Break

4:00pm – 5:30pm

The Survey Process and Ombudsman Advocacy Opportunities *(Crystal A-B)*

The survey process provides another opportunity for Ombudsman program advocacy and communication with state surveyors. During this session, an experienced state surveyor will provide a detailed overview of the survey process, including annual surveys, complaint surveys, and informal dispute resolution (IDR). The session will include case examples and identify resources to walk through a surveyor’s process. The session will include discussion about Ombudsman program engagement in the entire process, at the state and local level, as well as IDR. There will be ample time for questions and sharing successful practices.

*Speakers: **Patty Ducayet**, Texas State Long-Term Care Ombudsman; **Mark Kendall**, Director of Survey Operations, Regulatory Services Division, Texas Department of Health and Human Services; **Jackie DeGenova**, Ohio State Long-Term Care Ombudsman; **Erin Pettegrew**, Deputy State Long-Term Care Ombudsman, Ohio*

6:30pm – 9:00pm

Reception & NASOP Auction

Reception generously sponsored by RTZ Systems.



Wednesday, April 24

8:00am – 5:00pm

Registration *(West Promenade)*

7:30am – 8:30am

Breakfast

Breakfast generously sponsored by Mon Ami.



8:30am – 10:00am

Fiscal Management – What Does It Mean for You? *(Crystal A-B)*

The State Ombudsman has clear responsibilities for fiscal management of the program. In this session, speakers will provide a brief overview of fiscal management responsibilities for Ombudsmen, define budget terminology, and provide hands-on, practical tips for your role in managing and reporting funding. A discussion will take place as a large group as well as in small groups based on program structure. We will discuss what does indirect costs mean, how much is too much for administrative and indirect costs, tips for providing oversight of local Ombudsman entities budgets (for decentralized programs), and what to do if you identify issues with spending (e.g., Title VII funds spent on non-LTCOP activities, inflated supply lines, expenditures less than minimum funding requirements).

*Speakers: **Beverley Laubert**, National Ombudsman Program Coordinator, ACL; **Alice Kelsey**, Deputy Director, Administration on Aging, ACL; **Claudette Royal**, New York State Long-Term Care Ombudsman; **Laurie Facciarossa Brewer**, New Jersey State Long-Term Care Ombudsman*

10:00am – 10:30am

Break

10:30am – 12:00pm

Ensuring and Utilizing Quality Data *(Crystal A-B)*

If it isn’t documented, it didn’t happen, but how do you incentivize your program

representatives to document their work accurately, consistently, and on time? This session will focus on how to explain the value of data, discuss data management, and share quality assurance efforts to improve reporting. Speakers will also share highlights of FFY2023 National Ombudsman Reporting System (NORS) and review the variety of Older Americans Act Performance System (OAAPS) reports and how to use them.

*Speakers: **Beverley Laubert**, National Ombudsman Program Coordinator, ACL; **Sandra Hale**, Delaware State Long-Term Care Ombudsman; **Carolyn Fenn**, Massachusetts, State Long-Term Care Ombudsman; **Melinda Burns**, Information and Data Specialist, MA Long-Term Care Ombudsman Program*

12:00pm – 1:45pm

Luncheon (Crystal A-B)



Speaker: **Alison Barkoff**, Principal Deputy Administrator, Performing the Duties of the Administrator and Assistant Secretary for Aging, Administration for Community Living (ACL)



Speaker: **Kari Benson**, Deputy Assistant Secretary for Aging, Director of the Office of Long-Term Care Ombudsman Programs, Administration for Community Living (ACL)

2:15pm – 3:45pm

Developing a Playbook for Responding to Common Complaints (Crystal A-B)

Wouldn't it be nice to have a playbook for how to respond to common complaints? During this session, attendees will break into small groups and brainstorm elements to consider when investigating and resolving common complaints in nursing facilities. The small groups will be provided with a template for their discussion. The discussions will include a review of related nursing home regulations, how to interpret and use information from the State Operations Manual (SOM), tips for reading a chart (as appropriate), and identifying individuals to speak with and what questions to ask related to a specific common complaint. Following the discussions, the small groups will report out their playbook to all attendees, so others can add to or challenge their process. NORC will compile the feedback into "playbooks" to share with the entire LTCOP network, similar to the Basic Discharge Complaint Investigation Process Checklist and common discharge reasons complaint investigation checklists from this [resource](#) (e.g., [Reason 1](#)).

*Facilitators: **Carol Scott**, LTC Ombudsman Program & Policy Manager, NORC; **Amity Overall-Laib**, Director, NORC*

3:45pm – 4:00pm

Break

4:00pm – 5:30pm

You Are Not Alone: A Facilitated Discussion of Program Management Issues – Part II (Crystal A-B)

Be ready to participate in a robust discussion during Part II of the "You Are Not Alone: A Facilitated Discussion of Program Management Issues" from last year's conference. ACL's Office of Long-Term Care Ombudsman Programs will use de-identified examples of technical assistance requests and issues facing the State Ombudsman in a facilitated

session. State Ombudsmen will hear a brief description of the issue and add their perspectives in response to discussion prompts. The session is not intended to provide concrete answers to the issues but to prompt thoughtful examination. Discussion prompts will be useful for State Ombudsmen to apply to their own issues as they arise in day-to-day program management.

Speaker: **Beverley Laubert**, National Ombudsman Program Coordinator, ACL

Thursday, April 25

8:15am – 10:00am Registration (West Promenade)

7:00am – 8:15am Breakfast on Your Own

8:30am – 12:00pm

Systems Advocacy – Legislative Advocacy and Beyond! (Crystal A-B)

Systems advocacy is a critical part of the Ombudsman’s duties as defined in law and regulation. This session will provide basic information about the legislative process and your advocacy as well as provide an opportunity to discuss your challenges and successes with your peers. Part one of the session will focus on the legislative process and legislative advocacy. Presenters will share advocacy tips, including how to cultivate relationships with legislators and staff and how to present information effectively. Learn the key times to influence the legislative or regulatory processes. Discuss strategies to address critical issues, including how to share resident stories to impact change.

Speakers: **Brian Lindberg**, NASOP Public Policy Advisor; Vice President, Health and Aging Policy, Healthspieren LLC; **Ashley Carson Cottingham**, Deputy Director, Oregon Long-Term Care Ombudsman Program; **Sam Brooks**, Director, Public Policy, Consumer Voice.

BREAK (10:00am – 10:30am)

The second part of the session will provide tips and strategies for addressing systemic issues in your state. Presenters will share best practices and you will discuss how to develop a statewide approach and equip program representatives to participate in systems advocacy. Learn from the experiences of other programs and experts.

Speakers: **Sam Brooks**, Director, Public Policy, Consumer Voice; **Jocelyn Bogdan**, Senior Program & Policy Specialist, Consumer Voice; **Melanie McNeil**, Georgia State Long-Term Care Ombudsman; **Leah McMahon**, Colorado State Long-Term Care Ombudsman; **Sherry Culp**, Kentucky State Long-Term Care Ombudsman; **Kaili Kuiper**, Vermont State Long-Term Care Ombudsman; **Marie Coe**, Nevada State Long-Term Care Ombudsman

12:00pm – 12:15pm **Conference Closing** (Crystal A-B)

12:45pm – 7:00pm

NASOP Networking Event

Meet in the hotel lobby to share an Uber/Lyft/Taxi ride. It is a 10-minute drive to lunch.

