


beInspired.

increase  
**ENGAGEMENT.**



Senior  
*Options*<sup>LLC</sup>  
SEVENTH ANNUAL  
NETWORKING  
RETREAT

Grow Your  
**Brand.**

2022 VIRTUAL NETWORKING PROGRAM



## We are virtual for 2022!

No worries though, you will receive three days of instruction from our experts specifically tailored for the Senior Options Partner Network. We will cover home care to hospice, clinical care to sales, and HIT (Health Information Technology) solutions and financial benchmarking – We cover it all this year! You'll learn new skills, become more engaged and virtually leave with takeaways you can start the next day to enhance the work you're doing today, while preparing for the demands of tomorrow!

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**Dr. Nancy King**  
Senior Options



**Michelle Bridges**  
Senior Options



**Joan Noe**  
Senior Options



**DeAnn Akins**  
OctoFly Dreams



**Michele Holleran**  
Holleran & Associates



**Dyan Trent**  
Real Creative Solutions



**Devyn Jackson**  
Senior Options

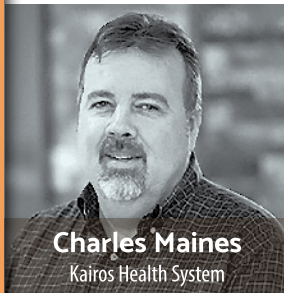


**Kimberly Beasley**  
Senior Options



**Alisa Miller**  
Kairos Health System

## Featured Speakers



**Charles Maines**  
Kairos Health System



**Rachael Buttler**  
Westminster-Canterbury at Home



**Terri Morgan**  
First Choice



**Sarah McBride**  
Westminster-Canterbury at Home



**Tammi Shaffer**  
Westminster-Canterbury at Home



**Sally Huston**  
Senior Options



**Rose Yohe**  
Lake Prince At Home



**Melinda Coley**  
Senior Options



**Joan Punch**  
Senior Options

## Master of Ceremonies **Joan Noe**

All times noted are for Eastern Standard Time (EST)

### WEDNESDAY MARCH 2

#### 1 PM to 1:40 PM | KICK-OFF & OPENING REMARKS

From Senior Options – Dr. Nancy King | President  
Michelle Bridges | Sr. Director, Business Development  
Joan Noe | Director, Partner Engagement

#### 2:30 to 4:30 PM | KEYNOTE | SESSION B

**Creating a Culture that Values Engagement**  
DeAnn Akins | Founder+CEO | OctoFly Dreams

### THURSDAY MARCH 3 continued

#### 2:15 to 4 PM | OUTREACH BREAKOUT SESSIONS

#### 2:15 to 2:45 PM | SESSION 01

**Taking Care of Your Agency's #1 Customer**  
Michelle Bridges | Senior Options

#### 3 to 4 PM | SESSION 02

**Widen Your Online Footprint for Success**  
Dyan Trent | Real Creative Solutions

### THURSDAY MARCH 3

#### 10:15 AM to 12:15 PM | KEYNOTE 1 | SESSION C

**Becoming the Face of the Agency**  
Michele Holleran | CEO | Holleran Consulting

#### 1:15 to 2:15 PM | KEYNOTE 2 | SESSION D

**Go Digital or Go Out of Business?**  
Dyan Trent | Founder+CEO | Real Creative Solutions

#### 2:15 to 4 PM | LEARNING SESSIONS

#### 2:15 to 2:45 PM | SESSION E **Health Information Technology**

Devyn Jackson | Director, HIT, Senior Options

#### 3 to 3:15 PM | SESSION F

**It's all About You! A Mindfulness Break**  
Kimberly Beasley | Supervisor, AR, Senior Options

#### 3:15 to 4 PM | SESSION G **Manage Your Agency's Managed Care**

Alisa Miller | President+CEO  
Charles Maines | Sr. Director, Contracting & Network Dev.  
Kairos Health System

### FRIDAY MARCH 4

#### 10:30 to 11:45 AM | ROUND TABLE CAFE'

Join us for 3 • 20-minute topics – You will move to all three sessions in your assigned Zoom breakout room:

#### **Build Your Agency through Home Care | SESSION H**

Moderator: Devyn Jackson | Senior Options  
Presenters: Rachael Buttler, WCAH  
+Terri Morgan, First Choice

#### **How is Your Hospice Agency Unique? | SESSION I**

Moderator: Joan Punch | Senior Options  
Presenters: Sarah McBride + Tammi Shaffer, WCAH

#### **Continuum Management | SESSION J**

Moderators: Michelle Bridges + Sally Huston, Senior Options  
Presenters: Rose Yohe, Lake Prince At Home

#### 1 to 2PM | OPERATIONAL EFFICIENCIES | SESSION K

Melinda Coley | Sr. Director, Finance & Operations  
Joan Punch | Sr. Director, Clinical Operations | Senior Options

#### 2-2:45 PM | YEAR IN REVIEW + CLOSING REMARKS

Joan Noe | Senior Options





1 to 1:40 PM - Session A

# Kick-Off +Opening Remarks

### Who Should Attend?

All participants

### Session Description

Join us as Joan kicks off our retreat and Nancy welcomes our Senior Options Network to the 2022 Virtual Retreat. Nancy will review the many accomplishments and challenges of 2021. She will also share a look into the future of a post-pandemic world for home and community-based services.



4,839

MEDICARE HOME  
HEALTH EPISODES



260

HOSPICE AVERAGE  
DAILY CENSUS

[REGISTER  
HERE](#)



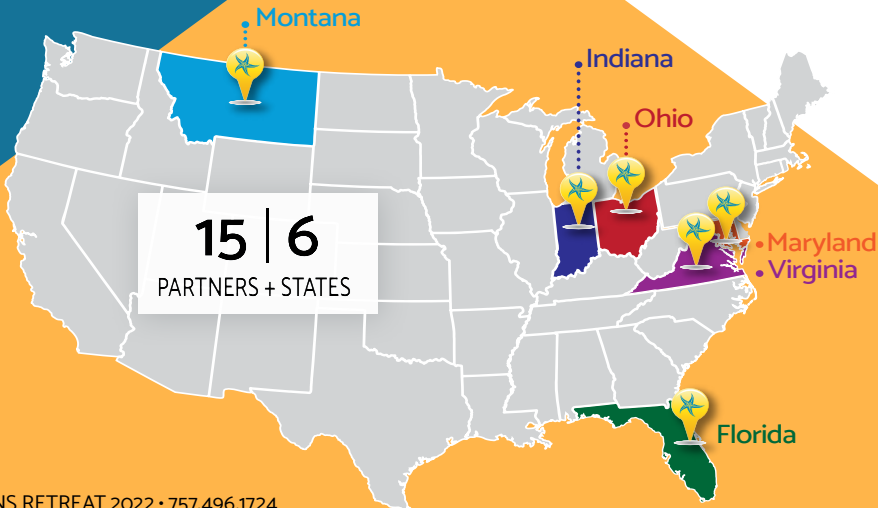
**Dr. Nancy King**  
President  
Senior Options



**Michelle L. Bridges**  
Senior Director  
Business Development  
Senior Options



**Joan Noe**  
Director  
Partner Engagement  
Senior Options



2:30 to 4:30 PM – Session B

## Creating a Culture that Values Engagement



**DeAnn Akins**  
Founder | CEO  
*OctoFly Dreams*

### Who Should Attend?

All participants

### Session Description

**ENGAGEMENT: A word we all know too well.**

How is your Engagement?

What is your Engagement rate?

Are your employees Engaged?



In this session, you will learn the value of Engagement and what it can mean to your organization – interested in creating a culture that values a high level of Engagement?

DeAnn will share strategies that will help strengthen your approach to building your Engagement through grounded communication and focusing on building relationships over tasks.

DeAnn has more than 20 years of experience in facilitated leadership development and brings a passion for personal growth and innovation.

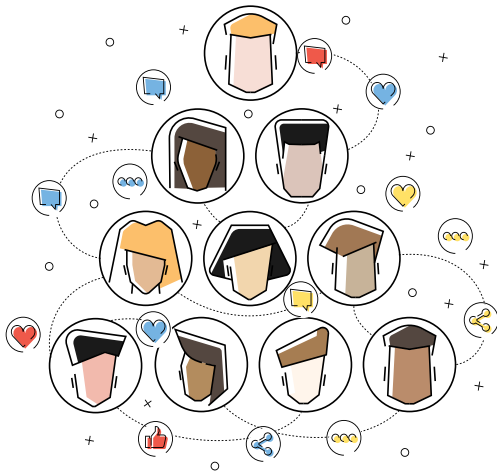
### Who Should Attend?

All participants

### Session Description

How are you perceived by others?  
Does your agency have clarity of mission?

Learn how to move from great to greater during our time with Michele Holleran, who is re-joining our retreat this year.



Session C  
10:15 AM to 12:15 PM

## Becoming “The Face” of the Agency



**Michele Holleran**  
CEO  
*Holleran Consulting*

It’s not enough to build an agency in today’s world: The experts advise that you, yes, you – should also be the face of that agency for it to succeed. But what does it mean to be the face of an agency?

Here, Michele explains all you need to know to represent your agency in a way that catapults it toward serious success.

Michele brings more than two decades of experience in quality improvement and customer engagement.

**People invest in people, not agencies.**





“A Thriving Business Feeds on  
Generating Engagement.”

– Forbes



**Dyan Trent**  
Founder | CEO  
*Real Creative Solutions*

With a passion for excellence, Dyan has been in marketing and creative services for over three decades. Dyan is a woman on a mission, devoted to making each client’s image the best in their industry.

1:15 to 2:15 PM – Session D

## Go Digital or Go Out of Business?

### Who Should Attend?

All participants (essential for administrators and outreach coordinators).

### Session Description

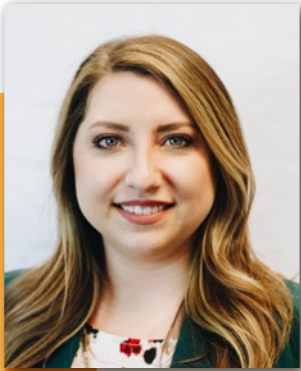
During this time of uncertainty, it is absolutely crucial for businesses to build their brand by connecting with consumers through a digital presence and stay relevant.

Dyan will give us a birds-eye view on how to cut-through all of the digital clutter, and get right to work on building and/or improving your online presence in 2022.

Websites, social channels, Google Reviews, analytics and Google My Business, are just a few of the topics Dyan will review in this fast-paced hour.

**You Cannot Buy Social Engagement –  
You Must Build It.**





**Devyn Jackson**  
 Director, HIT  
 Senior Options

2:15 to 2:45 PM – Session E

## Health Information Technology (HIT)



### Who Should Attend?

A must for all administrators, finance departments and clinical leaders.

### Session Description

Join Devyn Jackson as she walks through Senior Options' strategic plan in Health Information Technology (HIT). She will provide details on HIT including Netsmart, Homecare and other strategic objectives



**Kimberly Beasley**  
 Supervisor  
 Accounts Receivable  
 Senior Options

3 to 3:15 PM – Session F

## It's All About You *A mindfulness break*



### Who Should Attend?

A must for all administrators, finance departments, medical directors, clinical leaders, social workers, spiritual leaders, and hospice staff members.

### Session Description

Learn how to slow down racing thoughts, let go of negativity, and calm both your mind and body. In today's fast-past world of constant distractions, we all need to take time out to be mindful so that we can acknowledge and accept our thoughts, feelings, and sensations without judgment.



### Who Should Attend?

An important session for administrators, clinical leaders and financial leaders.

### Session Description

Navigating the ever-changing Medicare Advantage landscape; how to best position your agency for continued Medicare saturation in your market.



**Alisa Miller**  
President | CEO  
*Kairos Health System*

3:15 to 4 PM – Session G

## Manage Your Agency's Managed Care



Hear from Kairos' President and CEO Alisa Miller and Chuck Maines, Senior Director of Contracting & Network Development, as they walk through the opportunities and challenges of "Managing Your Agency's Managed Care."



**Charles Maines**  
Senior Director  
Contracting & Network Dev.  
*Kairos Health System*

# Outreach Breakout Sessions



2:15 to 2:45 PM - Session 01

## Taking Care of Your Agency's #1 Customer

### Who Should Attend?

An important session outreach coordinators and clinical liaisons.



**Michelle L. Bridges**  
Senior Director  
Business  
Development  
Senior Options

### Session Description

Continuum management is an important part of home and community-based services. Making sure that you are making connection on your campus to allow patients to have the full impact of your continuum of care.

3 to 4 PM - Session 02

## Widen Your Online Footprint for Success

### Who Should Attend?

Essential for administrators and outreach coordinators.



**Dyan Trent**  
Founder | CEO  
*Real Creative  
Solutions*

### Session Description

Want to learn top strategies for how to use your online presence to increase your engagement and cultivate a strong brand? If so, this session is for you! Dyan will show you how to improve your digital presence through a variety of platforms. Reach new audiences, grow your engagement, and build success.



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Who Should Attend?

Medical directors, nurse practitioners, administrators, and hospice teams.

10:30 to 11:45 AM - Sessions H, I, J

Round Table Cafe' 3 • 20-Minute Topics

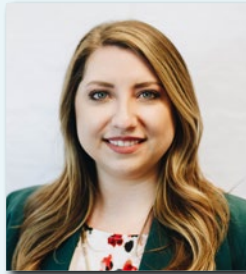
SESSION H

**Build Your Agency through Home Care**



Private-duty is in demand; is your agency able to serve your market? Hear keys to success and opportunities to mitigate recruiting challenges.

MODERATOR

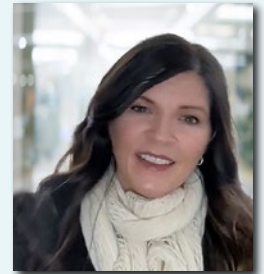


**Devyn Jackson**  
Senior Options

PRESENTERS



**Rachael Buttler**  
WCAH



**Terri Morgan**  
First Choice

SESSION I

**How is Your Hospice Agency Unique?**



Learn the best practices and opportunities to expand your mission from one the Senior Options' leading agencies: Westminster-Canterbury at Home in Virginia Beach.

MODERATOR



**Joan Punch**  
Senior Options

PRESENTERS



**Sarah McBride**  
WCAH



**Tammi Shaffer**  
WCAH

SESSION J

**Continuum Management**



Integration and engagement with your community's staff will lead to a greater understanding of how your agency will augment campus offerings.

MODERATORS



**Michelle Bridges**  
Senior Options

PRESENTER



**Sally Huston**  
Senior Options



**Rose Yohe**  
Lake Prince At Home

### Who Should Attend?

Essential for administrators, financial team, and clinical leaders.

### Session Description

You will learn how to take an objective look at how to utilize operating metrics and benchmarks to successfully run your agency



**Melinda Coley**  
Senior Director  
Finance & Operations  
Senior Options

1 to 2 PM - Session K

## The Use of Metrics to Promote Operational Efficiencies



Learn ways to sharpen your business knowledge to oversee revenue cycle management. We will augment that with looking at clinical indicators and how they impact revenue.

We will also look at key tools to better understand home and community-based metrics for more positive outcomes.



**Joan Punch**  
Senior Director  
Clinical Operations  
Senior Options



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2 to 2:45 PM - Session L

## Year in Review & Closing Remarks

### Who Should Attend?

All participants

### Session Description

Join Joan as she features each of our Network Partners and their successes over the past year.

Thank you for joining us!



**Joan Walter Noe**  
Director  
Partner Engagement  
Senior Options



**Dr. Nancy King**  
President  
Senior Options

### VISION STATEMENT

Become the nationally recognized and endorsed network of successful and sustainable HCBS providers.



EXPERIENCE



SUPPORT



POTENTIAL



SUCCESS

# The Senior Options Network

[Click Here for More News from Senior Options](#)

**ASBURY HOME SERVICES**  
Anticipate More



**BRANDON OAKS**  
*at home*



**First Choice Home Health & Hospice**



**FLEET LANDING**  
*Home Health*



**GENACROSS**  
LUTHERAN SERVICES  
GENACROSS AT HOME



**HOOVERWOOD LIVING**  
*Hospice*



**Lake Prince at Home**  
An EveryAge Program



**McGregor**  
HOSPICE



**Mennonite Home Health & Senior Services**  
of  
Mennonite Home Communities of Ohio



**St. John's United**  
HOME HEALTH & HOSPICE



**Vinson Hall Retirement Community**  
supported by Navy Marine Coast Guard Residence Foundation



**Westminster At Home**  
HOME HEALTH & HOSPICE SERVICES



**whv**  
Warm Hearth at Home



**Westminster Canterbury**  
AT HOME



**WESTMINSTER CANTERBURY** | **at HOME**  
RICHMOND




Assisting LeadingAge senior living organizations to further their mission with Home and Community Based Services.



**LeadingAge**  
2022 Members Serving Members