

# **C4A Annual Meeting and Allied Conference**

## **"Embracing Change"**

**November 17-19, 2004  
Hyatt Newport  
Newport Beach, CA**

### **PARTNERS:**

**California Department of Aging**

**Linkages Site Association**

**CWDA – Adult Services**

**AAA Nutritionists**

**California Health Advocates**

**Triple-A Council of California**

**California Association of Caregiver Resources Centers**

**Multipurpose Senior Services Program (MSSP) Site Association**



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**Hyatt Newporter  
1107 Jamboree Road  
Newport Beach, CA 92660**

## **Conference at a Glance**

### **TUESDAY, NOVEMBER 16, 2004**

9:00 a.m. – 5:00 p.m.	CHA Board and Membership Meeting
1:00 p.m. – 5:00 p.m.	New AAA Directors Orientation Session
1:00 p.m. – 5:00 p.m.	MSA Meeting
1:30 p.m. – 5:00 p.m.	C4A Executive Committee Meeting

### **WEDNESDAY, NOVEMBER 17, 2004**

8:00 a.m. – 9:45 a.m.	LSA / MSA Joint Meeting
8:30 a.m. – 12:00 noon	HICAP Training
9:00 a.m. – 12:00 noon	AAA Planners Meeting
9:00 a.m. – 12:00 noon	New AAA Directors Orientation Session (continued)
9:00 a.m. – 12:00 noon	TACC General Meeting
10:00 a.m. – 12:00 noon	LSA Meeting
1:30 p.m. – 3:00 p.m.	Opening Session
3:00 p.m. – 5:00 p.m.	HICAP Training (continued)
3:00 p.m. – 5:00 p.m.	Workshops
6:00 p.m. – 7:30 p.m.	Reception & Anniversary Celebration

**THURSDAY, NOVEMBER 18, 2004**

7:30 a.m. – 9:00 a.m.	Continental Breakfast
9:00 a.m. – 12:00 noon	CWDA – LTC Operations Committee
9:00 a.m. – 10: 15 a.m.	Workshops
10:30 a.m. – 11:45 a.m.	Workshops
12:00 noon – 1:30 p.m.	Luncheon
1:30 p.m. – 5:00 p.m.	HICAP Training (continued)
1:30 p.m. – 3:00 p.m.	Workshops
3:30 p.m. – 5:00 p.m.	Workshops

**FRIDAY, NOVEMBER 19, 2004**

7:30 a.m. – 9:00 a.m.	Continental Breakfast
9:00 a.m. – 12:00 noon	C4A Board Meeting
9:00 a.m. – 12:00 noon	CWDA-Adult Services Meeting
9:00 a.m. – 12:00 noon	AAA Nutritionists Meeting
9:00 a.m. – 11:30 a.m.	TACC Session

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**Opening Session**

**Wednesday, November 17, 2004**

**1:30 p.m. – 2:45 p.m.**

**Keynote Speaker:**

**Steve Donahue**

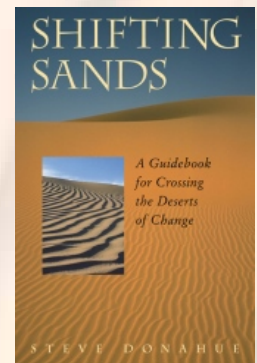
**“When the Paved Road Ends the Journey Begins”**

# *When the Paved Road Ends the Journey Begins*



AARP California is pleased to sponsor the Sahara Desert adventurer, author, drummer, storyteller; Steve Donahue is a one person ‘tour de force.’ His presentations combine fast paced humor with heart-stopping tales from his desert odyssey. A superb storyteller, he shares wisdom as old as humanity and never more relevant than today. Steve is the featured speaker for the Opening Session at the upcoming C4A Annual Meeting and Allied Conference scheduled for November 17-19, 2004.

Steve’s book, Shifting Sands: A Guidebook for Crossing the Deserts of Change, has just been published by Berrett-Koehler. Based on his harrowing journey across the Sahara, *Shifting Sands* outlines six “Roles of Desert Travel” to guide readers through the deserts of life and change. Soulful yet practical, it presents the desert as a metaphorical place of change, often debunking the popular mountain-climbing metaphor that focuses on goal setting and achievement over the journey itself.



Steve writes about a paved road that crosses the first part of the Sahara Desert. Without warning it ends and travelers find themselves stuck in the sand and lost on the featureless terrain with maps that no longer work. And yet, it is still possible to cross this harsh and shifting desert but it requires a new way of thinking. Californians are in a desert without any maps now that state government has started “blowing up the boxes.” The paved road has ended and we need to find our way in an environment of shifting values and structures.

From this inspiring presentation you will learn how to use change to your advantage and think of new ways to approach life, your job, and advocating for those you serve. Steve will show you how to move forward by “following a compass not a map.” You’ll discover how to “stop at every oasis” and “travel alone together.” His “Rules of Desert Travel” will guide you towards a deeper sense of purpose and a clearer sense of direction for navigating your way in such uncertain and transformational times.

For more information on Steve Donahue check out [www.stevedonahue.com](http://www.stevedonahue.com)



# **C4A Annual Meeting and Allied Conference**

## **November 17-19, 2004**

**Hyatt Newport**  
**1107 Jamboree Road**  
**Newport Beach, CA 92660**

### **Education Programs & Workshops**

**WEDNESDAY, NOVEMBER 17, 2004**

**3:30 p.m. – 5:00 p.m.**

#### **“Master Plan on Aging”**

The boomers are coming; are we prepared? The session will review and discuss the recommendations being presented to the Assembly Aging and LTC Committee by three successive advisory committees commissioned by Assemblymember Patty Berg. The master plan builds on the strategic plan on aging created in response to SB 910.

*Presenters: Assemblymember Patty Berg, Chair of the Assembly Committee on Aging & LTC; Dixon Arnett, Professor of Gerontology, San Diego State and former Director of the California Department of Aging; and Steve Schmoll, Executive Director, Council on Aging Silicon Valley.*

#### **“Corrective Action Plans for Audit Compliance”**

Are corrective action plans new? The session will look at developing corrective action plans for audit compliance. Participants will learn key aspects of a corrective action plan, and how it will be used by CDA to determine problem or “high risk” agencies. The presentation will cover how to prepare a corrective action plan or how to avoid having to prepare one.

*Presenter: Evelyn Young, Partner, Young and Lanse CPAs, LLP.*

#### **“Demystifying the Monthly Fiscal Reporting Process”**

The new consolidated Area Plan Contract combines most programs funded by the Older Americans Act and the Older Californians Act into one monthly reporting process. This session will focus on this change and how to correctly report expenditures and request for funds for Title III/VII, Title III/E, Title V, CBSP, and HICAP. Adequate time will be set aside for an open question and answer period.

*Presenters: Geri Baucom, Aging Programs Specialist, Fiscal/Contracts Team; and Johnna Meyer, Policy Manager, Fiscal/Contracts Team.*

**THURSDAY, NOVEMBER 18, 2004**

**9:00 a.m. – 10:15 a.m.**

**“A Day in the Life of Adult Protective Services”**

The workshop will provide participants an in-depth look at the demographics of elder abuse in California from a recent study conducted by the County Welfare Directors Association. Participants will learn who the victims are, who the most likely perpetrators are, and what types of abuse reports are received and in what ratios. If you thought you knew what elder abuse looks like, be prepared to be surprised!

*Presenters: Jennifer Bransford-Koons, Program Manager, Adult Protective Services, San Diego County; Dave Kochen, Human Services Administrator, Los Angeles County; and Linda Anderson, Division Manager, Adult Protective Services, Contra Costa County.*

**“Ethical Dilemmas in Direct Client Services”**

Every day, social service staff struggle with decisions that emerge as they serve clients. How do we address the self determination rights of cognitively-impaired clients? How do we define “non-compliance” for clients receiving care management services? Should mandated reporting responsibilities be viewed narrowly or broadly in our agencies? This workshop will present approaches for analyzing and resolving ethical dilemmas in direct client service.

*Presenter: Mary Angotti, LCSW, Health Care Ombudsman / Mediator, Kaiser, Baldwin Park Medical Center.*

**“Serving Diverse Communities”**

Today, being culturally competent is smart business. This workshop will share successful methods for providing services to older Californians from diverse populations, including recruiting and retaining volunteers. The presentation will give special attention to the populations classified as Asian or Pacific Islander, and Latino.

*Presenters: Gwen Yeo, Ph.D., Co-Director Stanford Geriatric Education Center in Stanford University School of Medicine; Susi Rodriguez Shapiro, PacifiCare Health Systems – Senior Solutions; Canossa Chan, Asian & Pacific Islander Older Adults Task Force.*

**10:30 a.m. – 11:45 a.m.**

**“Protecting Your Assets”**

The session will explore the issues regarding estate planning, Medi-Cal, financial products, home equity conversion, and public and commercial long term care insurance products. Presentation will highlight a panel discussion among an elder law attorney, financial planner, and home equity conversion planner, moderated by Bonnie Burns, Training and Policy Specialist.

*Presenters: Michael McGuire, Elder Law Attorney; Dennis P. Sunderman, CSA, President, ElderCare Insurance Services; and Harry Robbart, Reverse Mortgage Specialist, Financial Freedom Senior Funding Corporation.*

## **THURSDAY, NOVEMBER 18, 2004 (CONTINUED)**

### **10:30 a.m. – 11:45 a.m.**

#### **“IHHS Quality Assurance Initiative”**

Participants in this session will learn about the new mandates for Quality Assurance for both the State and counties. The session will include a detailed description and discussion of the new Quality Assurance initiative, the components of the initiative, as well as a projected timeline for implementation. Participants will have the chance to discuss how this IHSS initiative may impact services provided to mutual clients of the Area Agency on Aging.

*Presenters: Marie Van Beckman, Chief, Adult Programs Branch, CDSS; and Brian Koepp, Quality Assurance Bureau Chief, CDSS.*

#### **“Ethical Issues in the Management of Social Services Programs”**

Every day, managers in social services make decisions that have an ethical component to them. How do we determine the geographical boundaries for delivery of home delivered meals, knowing that we are balancing the needs of persons on either side of the boundary? How do we select the next person on the waiting list for care management services? When we are compiling needs assessment data, how do we weigh the “minority opinion data?” Does the agency implement an informal policy of providing “special” service to former volunteers in recognition for their previous service? This workshop will present approaches for analyzing and resolving ethical dilemmas inherent in the management of social services.

*Presenter: Mary Angotti, LCSW, Health Care Ombudsman / Mediator, Kaiser, Baldwin Park Medical Center.*

### **1:30 p.m. – 3:30 p.m.**

#### **“Let’s Talk Specifics”**

The workshop will focus on three primary fiscal areas: 1) budgeting of direct services, 2) documenting Program Development and Coordination (PD&C) activities, and 3) anticipated changes to the Fiscal Year 04-05 closeout process.

*Presenters: Geri Baucom, Aging Programs Specialist, Fiscal/Contracts Team; and Johnna Meyer, Policy Manager, Fiscal/Contracts Team.*



## THURSDAY, NOVEMBER 18, 2004 (CONTINUED)

### 1:30 p.m. – 3:30 p.m.

#### **“Implications of Our Food Stamp Policy”**

Should California’s food stamp policy making seniors and adults with disabilities ineligible for the program be changed? The Alameda County Area Agency on Aging and Alameda County Community Food Bank recently commissioned Samuels and Associates to conduct a series of focus groups and stakeholder meetings to discuss California’s “cash-out” policy, which makes SSI/SSP elderly and disabled ineligible for food stamps. This session will discuss the history and background of this policy that is unique to California. Results of the stakeholder discussions and focus groups will be presented along with recommendations for future advocacy efforts.

*Presenters: Dr. Sarah Samuels; Mary Louise Zernickle, MS MPH RD; and Maria Boyle, MS RD.*

#### **“Overview of Area Plan Requirements for 2005-2009”**

This session will orient Area Agency on Aging Planners in the use of the “Reference Guide for Development of the 2005-2009 Area Plan” to plan for the future. Planners will learn how to use the Reference Guide to prepare a four-year Area Plan and future updates that will meet minimum requirements.

*Presenters: Sherry Hanna, CDA Analyst; Tricia Nishio, CDA Area Plan Team Lead; and Denny Wight, CDA Analyst.*

### 3:30 p.m. -5:00 p.m.

#### **“Preparing for a CDA Audit”**

This session will explore what documentation is critical for Area Agencies on Aging to maintain in preparation of a CDA audit. Attendees will learn how to provide clear audit trails for material information in order to make the audit process go smoothly, as well as review what areas are considered material.

*Presenter: Evelyn Young, Partner, Young and Lanse CPAs, LLP.*

#### **“Overview of Area Plan Requirements for 2005-2009” (Continued)**

This session will orient Area Agency on Aging Planners in the use of the “Reference Guide for Development of the 2005-2009 Area Plan” to plan for the future. Planners will learn how to use the Reference Guide to prepare a four-year Area Plan and future updates that will meet minimum requirements.

*Presenters: Sherry Hanna, CDA Analyst; Tricia Nishio, CDA Area Plan Team Lead; and Denny Wight, CDA Analyst.*

## **THURSDAY, NOVEMBER 18, 2004 (CONTINUED)**

### **3:30 p.m. -5:00 p.m.**

#### **“Physical Activity, Nutrition, and Aging”**

It has become increasingly evident that older adults must be physically active to remain healthy and independent. Area Agencies on Aging Dietitians are becoming increasingly more involved in developing and managing active aging programs. A panel of Area Agency dietitians from Alameda, Los Angeles, San Francisco, Stanislaus and Humboldt/Del Norte Counties will present various models of successful programs designed to keep the older person physically active and healthy in addition to good nutrition.

*Presenters: Deborah Krzesni, RD; Area 1 Agency on Aging; Mary Louise Zernicke, MPH, RD; Alameda County Area Agency on Aging; Susan Kennedy, MBA, RD, County of Los Angeles Area Agency on Aging; Jill Erickson, RD; Stanislaus County Department of Aging; and Stella Wu Chu, MA, RD, San Francisco City and County, Aging and Adult Services.*

## **FRIDAY, NOVEMBER 19, 2004**

### **9:00 a.m. – 11:30 a.m.**

#### **“TACC Orientation and Issue Update”**

This session will explore and discuss TACC’s mission, its relationship with other organizations, whether State or local, and its role in the aging network. Nancy Dolton, Chair of the Monterey County Area Agency on Aging Advisory Council and Chair of the California Commission on Aging, will lead the discussion. Joyce Fukui, Deputy Director, California Department of Aging, will provide background and insights on the California Performance Review, the process for the four-year area plans, and other items of interest to members of local advisory councils.



**California Association of  
Area Agencies on Aging**

**25<sup>th</sup> Anniversary**

**Reception and Celebration**

**Wednesday, November 17, 2004**

**6:00 p.m. – 7:30 p.m.**

**Join us as we celebrate  
25 years of advocacy.**

# **2004 C4A ANNUAL MEETING AND ALLIED CONFERENCE**

The California Association of Area Agencies on Aging (C4A) is proud to present the seventh Allied Conference—the only integrated conference for long-term care service providers in California. This conference represents the collaboration of Area Agencies on Aging, home and community-based service providers, and consumers. This partnership allows an opportunity to present a full-service conference of informative educational programs and meaningful exhibits.

## **CONFERENCE DETAILS**

- Make your lodging reservations by calling Hyatt Newporter directly at (949) 729-1234. Reference C4A or Allied Conference. Special conference lodging rate of \$84.00 for single and double occupancy.
- Full conference registration is \$160.00 and includes: Wednesday reception, Thursday breakfast and luncheon, and Friday breakfast. Partial registration available—see “Registration” form.
- The Hyatt Newporter is located at 1107 Jamboree Road, Newport Beach, CA 92660. On 26 beautifully landscaped acres overlooking Newport Beach’s Back Bay, the Hyatt Newporter is the only resort-style hotel in the Newport Beach area. The hotel features three pools and whirlpools, nine-hole Executive Par 3 Golf Course, 16 lighted tennis courts, and is centrally located to Orange County Airport, and local attractions. For more information please visit the Hyatt Newporter website at <http://newporter.hyatt.com/property/index.jhtml>
- The Hyatt Newporter provides complimentary transportation to and from Orange County/John Wayne Airport (call the hotel for more information.) Supper Shuttle is available from Los Angeles airport. For reservations call 1-800-258-3826 or [www.suppershuttle.com](http://www.suppershuttle.com). Estimated cost from LAX for one person, one-way is \$40.

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**Registration**

Name: \_\_\_\_\_

Title: \_\_\_\_\_

Organization: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Phone: \_\_\_\_\_ E-Mail: \_\_\_\_\_

- Full Registration \$160.00 (Includes Wednesday reception, Thursday breakfast and luncheon, and Friday breakfast) \_\_\_\_\_
- Partial Registration \$120.00 (Please specify days) \_\_\_\_\_
  - Wednesday and Thursday
  - Thursday and Friday
- One day registration \$75.00 (please specify day) \_\_\_\_\_
  - Thursday only
  - Friday only
- Guest registration for events \_\_\_\_\_
  - Wednesday reception \$30.00
  - Thursday luncheon \$25.00

TOTAL \_\_\_\_\_

If you require special accommodations, please notify C4A no later than November 8, 2004.

Please make checks payable to: The California Association of Area Agencies on Aging (C4A)

Submit checks and registration form to:  
C4A, 980 Ninth Street, Suite 700B, Sacramento, CA 95814  
Phone: (916) 443-2800 Fax: (916) 554-0111 E-mail: c4a@pacbell.net

No refunds for cancellations after November 12 2004.