Responsive Care Management

When aging impacts families & stressful situations overwhelm, our national network of trusted experts help you get-started-right.

Visit VillagePlan.com to learn more.
Welcome to the new Aging Life Care Association, Experts in Aging Well! I’m honored to serve as your President for 2015 and to carry the banner of excellence for this great Association. While the essential nature of our organization will not change with our new brand, our identity and stature in the field certainly will. I see this year as one of great opportunity, with tremendous potential for growth and increased visibility in the world of aging care, with a keen eye toward the future of care for baby boomers and beyond.

I’m always excited to attend our annual conference, not only for the pleasure of seeing old friends, making new ones and sharing and learning with others who understand the complexities and intricacies of this business, but this year I am especially thrilled to share the tangible results of our branding research and the plans we’ve made to reveal our new brand to the world. You will behold our new look, check out our new and improved website, receive new materials that promote us and each of your businesses as well, and learn about the comprehensive digital marketing campaign that is already under way to link consumers, referral sources, potential clients and their families to us nationally, and back to you on a local level. As I write this, a stellar group of your colleagues is already composing 34 blogs, 5 white papers, and 4 e-books (on-line magazines) on topics like dementia, family dynamics, paying for care, choosing between assisted living options, and other topics that are research-based and make a professional contribution to our field. All of these electronic posts will lead interested parties to our website and then on to you through strategic links.

This branding “big reveal” is the fruition of many years of hard work at the Board level. A need to re-brand our Association first surfaced on our Strategic Plan in 2012 and has overlapped the tenures of the last three Presidents of the Association. A Board-level Task Force was assigned to oversee the process, a competitive bid went out to find the best company to help us, and last year we got the chance to work with a real pro in this arena and reap the benefits of her extensive research that has led us to where we are today. It has been a challenging, invigorating, mind-expanding and thrilling process to say the least. While the notion of change is not always easy and will take some adjustment, the Board firmly believes that we are on the right path to effectively position ourselves for the future.

So please come to Denver, as the old song says, and see for yourself what the Aging Life Care Association looks like. You will have an opportunity to hear Jane Cavalier discuss how to incorporate the new brand into your own business, as well as an opportunity to videotape a promotional video to introduce yourself and your business within the context of our new identity.

As always, I must share my tremendous respect for the incredible staff we have working for us in Tucson, led by the visionary Kaaren Boothroyd at the helm, as well as an extraordinary Board of Directors who dedicate so much time and thought and energy into this great Association. My hat also goes off to the Chapter Presidents who have been so creative and responsive in this branding process, their input has been extremely educational and critical to our process.

See you in Denver!

Twitter
Facebook
LinkedIn

Don’t miss out
Start using Social Media today!
Have you added social media to your marketing efforts?
If you haven’t, you are missing an opportunity to connect with potential clients and referral sources. According to Fast Company, the fastest growing demographic of Twitter is the 55-64 age bracket and for Facebook it’s the 45 – 54 age bracket.

Get started today by continuing the conversation with NAPGCM social – Facebook, LinkedIn, and Twitter. By liking, sharing, and tweeting NAPGCM posts, you will have instant content for your social sites.
April 2015

National Healthcare Decisions Day
April 16, 2015 | www.nhdd.org

NAPGCM 31st Annual Conference
Entering a New Season… Of Clarity, Unity & Opportunity
April 29 - May 2, 2015 | Grand Hyatt Denver | Denver, CO
www.caremanager.org

May 2015

May is National Aging Life Care Month
www.aginglifecare.org

NAELA 2015 Annual Conference
JW Marriott | Orlando, FL | May 13-16, 2015 | www.naela.org

Long-Term Care Insurance:
Helping Clients Get the Most From Their Policy
NAPGCM Business Webinar | May 28, 2015 | 4:00pm ET
www.caremanager.org

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June 2015

CMSA 25th Annual Conference & Expo
Orlando, FL | June 23-26, 2015 | www.cmsa.org

July 2015

n4a Answers on Aging 40th Annual Conference

Empowering Caregivers Who Are Facing Difficult Decisions | NAPGCM Clinical Webinar
July 22, 2015 | 4:00pm ET | www.caremanager.org

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Summer 2015

***SPECIAL EVENT WEBINAR***
Slow Medicine | Dennis McCullough, MD | Details coming soon

August 2015

2015 American Psychological Association
123rd Annual Convention

(continued on page 5)
Executive Director’s Message
Kaaren Boothroyd

The beginning of the year is always an invigorating time – for the Association, the Board, and the staff.

The Board does a lot of the hard work on our strategic plan in October, which always includes study of both internal statistics and reports as well as readings on larger issues and trends impacting the profession. Evaluating proposals, priorities, and resources pushes the decision-making process until a strategic plan is formed.

It is always beneficial to revisit the Strategic Plan at our first Board Meeting of the year with fresh eyes – to make sure we’ve hit the right balance, focus, and priorities in our plan. The hardest part of strategic planning is not choosing priorities – that’s the fun part! No, the hardest part is deciding what we need to put on hold. I do believe the process works and results in a plan that is realistic, targeted, and invigorating!

As you can see from the Strategic Plan Goals in this issue of Inside NAPGCM, our targets are focused on membership, education, and branding.

Our new brand – Aging Life Care™ – will be introduced to the world via our new website at our Annual Business Meeting in Denver. At the same time, the Digital Marketing Campaign begins in earnest. The new Digital Marketing Committee has been meeting since earlier this year, creating content for this campaign – including 36 blog posts, 5 white papers, and 4 e-books. All this content will be pushed out via our own website, as well as Facebook, LinkedIn, and Twitter. Members can amplify their impact by sharing, commenting, or posting. You can also use any of the content we publish for use in your own practices (with credit to author and ALCA).

In April we will be offering members an “Aging Life Care Branding Tool Kit,” which will include your new member logo, sample language to incorporate the new brand into your marketing materials, press release templates, and other resources. We hope this will inspire you! (And don’t forget, if you are coming to the Denver conference, you can sign up to participate in a hands-on workshop with Branding Consultant Jane Cavalier on how to put the brand to work for your practice. We will be videotaping the workshop as well and will make it available to all members after the conference.)

Now is the time for every member to get involved – to move the profession and your practice to a new level and a heightened recognition among consumers, referral sources, and other professionals who serve older or disabled adults.

We also extend many thanks to the many members who have already contributed an abundance of their time and talent to the profession and association. Our success is lifted by members!
Board Bits | Jan 21 & 22, 2015 in Sarasota, FL

Reports

- Digital Marketing Campaign -- committee of 15 are creating content for blogs, e-books, and white papers; with support of Branding Consultant, the big push begins May 1.
- Both Board Members and Chapter Presidents received training on how to use Facebook, LinkedIn, and Twitter to amplify our efforts.
- 2014 Year-end membership totaled 2,058 members; we experienced an 86% retention rate in 2014.
- Management of NACCM – after training in November, operations successfully moved to Tucson in late December.

Updates

- “How to make the brand work for your practice” -- three workshops have been scheduled at the conference, including one to focus on strategies for the solo practitioner.
- Trademarking – Legal Counsel Hugh Webster shared update regarding filings for trademarking the Association, “Aging Life Care Association”; the service, “Aging Life Care”; and the practitioner, “Aging Life Care Professional.”
- Chapter Presidents Retreat held on Jan 20, included discussion of those interested in merging with national.

Business

- Board reviewed Strategic Plan, developed in October 2014; focus was on activity for calendar year 2015, including assignments and timelines.
- Membership Categories – board discussed renaming of membership categories in order to get away from categories that sound like job titles. It is important that every member use language that fits their practice.
- The Board also reviewed qualifications of each level of membership, as presented by the Member Category Task Force. Very strong agreement that the highest level of membership requires the highest qualifications (as are currently stated in the “Certified Care Manager” Category) – education, experience, certification. Final recommendations will be sent to the membership for vote in September.
- Webinars – discussion included recommendation that Association offers a study course to prepare for the CMC certification exam. Also suggested webinars that focus on issues related to nonprofit practices.

ALCA Branding Toolkits Coming Soon!

See how the ALCA brand can work for your practice and in your chapter with these toolkits.

The ALCA Member Toolkit will include

- Your new member logo and guidelines
- Trademark usage rules
- Press release templates and media talking points
- Sample language and “key words” for use on your website and other marketing materials
- Link to video of Branding Workshop to be held at Denver Conference – with special focus for solo practitioners
- Samples of newly branded Referral Brochure, Code of Ethics & Standards of Practice booklet, and PowerPoint Presentation Products – with deep discounts for early orders
- Branding FAQs

The ALCA Chapter Toolkit also includes

- Your chapter logo
- Six-foot standing Aging Life Care™ Promotional Banner with chapter logo for use at local events
All toolkit items will be made available to you digitally, with the exception of the Chapter Promotional Banners, which will be shipped directly to your Chapter President or designated recipient.

The Branding Workshop Video link will be available in early May.

Watch your e-flashes for announcements in April about the release of these Toolkits!
Chapter Updates

Florida | Connie McKenzie, President

The Florida Geriatric Care Managers Association is working with Health Services Researchers Judith Ortiz, PhD, MBA and Mary Ann Horne, MHA to conduct Phase II of our research study. All of our members were asked to reach out to the “responsible party” for active clients. Responsible party was defined by our research committee as “an individual or entity, with ongoing involvement, who has provided authorization for care management services.” They were then surveyed by participating in an on-line questionnaire about their experience with care management services. FGCMA’s goal is to evaluate how we can improve our services to meet not only the needs of our clients, but from the perspective of the responsible party as well. We want to thank those who participated to meet the survey deadline of March 7th, 2015. We hope to have the results published by the end of August.

If you would like to access a summary of Phase I “The Value of Care Management” please go to www.fgcma.org.

Our 2015 conference in Sarasota was a huge success with Barbara Levison, Conference Chair, raising the bar on education as well as ensuring that there was plenty of time in our busy schedule to network with old and new friends-- not to mention a few Clowns from the Circus Arts Conservatory of Sarasota. We had the privilege of having NAPGCM board members present at our conference and our first opportunity and great pleasure to meet our new President, Jeffrey Pine. Kaaren Boothroyd, Executive Director, presented at our business luncheon to update our members on re-branding to Aging Life Care Association and talked about the benefits, goals, and opportunities.

Our 2016 conference planning is in motion with Brandy Gregg as our Conference Chair and members from the Orlando Unit and from across the State volunteering to participate on many of the committees. Orlando is a great destination for networking with peers and participating in continuing education. We would like to challenge our membership to 100% attendance. Watch for ‘Save the Date’ announcements to confirm the date on your calendar for the 2016 conference “Buckle Up and Ride, Higher, Stronger, Faster.”

It is my honor to share with our members that FGCMA received a $10,000 donation from the Evelyn McPherson Foundation. Evelyn McPherson was a woman of honor who defined advocacy in her daily life but also through her charitable foundation after her death. Our board has voted to accept this donation into a special fund titled the Evelyn McPherson Education and Advocacy Fund. We have initiated a task group to set up guidelines and provide recommendation on how these funds will be utilized to benefit our members as well as vulnerable adults in our community. Members who are interested in volunteering their time to be on this task force may contact Connie McKenzie at 954-486-1990.

Throughout 2015, FGCMA Board members will be working strategically to align our goals with the Aging Life Care Association. Our committees are preparing to present parallel short term goals to assist members in our Chapter with adopting the new logo, language, and to encourage participation in the social media message to build momentum and clarity to the media that we will all benefit from. We encourage you to attend your Unit meetings, participate in webinars, and to join a committee to share your professional talent. There is strength in numbers. We invite each of you to step up, volunteer, and contribute to our association. Please call any board member to ask how you can get involved!

Mid-Atlantic | Denise Valerio, President

Greetings! As of March 4, 2015, the MA Chapter is holding strong at 198 members. Our Units continue to meet on a regular basis and these meetings continue to bring members together for support and resource building. The Chapter and its Board of Directors agreed to hold an annual conference every other year and have smaller, one day type “mini conferences/workshops” at the Unit level in each State within the Chapter’s geographic area. Each of the Units are busy planning their one day workshop and these will occur throughout the calendar (continued on page 8)
Chapter Updates (continued from page 7)

year. The Unit Leaders continue to have monthly conference calls with the Vice-President of the Board.

Committee Chairs and their members continue to work diligently at maintaining a presence within the association and our Chapter Newsletter continues to be an outstanding and well put together publication. The President-Elect on the Board has taken on a new role with the Committee Chairs and this presence has provided for a much better streamlining of information that is important for the continued success of the committees’ work.

The Branding project and rollout has been foremost on all of our Chapter’s Members. This is a topic that seems to be a topic of discussion at all Unit meetings and Board Meeting calls. While there is positive excitement and anticipation about all of this and how it will work, there of course continues to be some reservation on how this repositioning of our Association will directly impact the future of our care management profession. The President of the Board has begun the conversation with the full Board regarding the idea of whether or not to “merge” the MA Chapter into the National Association. The introduction of this idea was well received by the Board members and during the March Board Meeting call, Kaaren Boothroyd, will be joining us to discuss in greater detail the nuts and bolts of what a merger of this nature would look like. The Unit Leaders in the Chapter have also been invited to sit in on this Board Meeting call so that they can also become ambassadors as well in disseminating accurate and helpful information to other members so that a sound decision can be made around this idea.

There is much anticipation that after the National conference in Denver is over, that there will be much to do on a Unit and Regional level in order to assist members in getting up to speed with bringing their practices into the new association as an “aging life care” specialist/manager.

Midwest | Debra D. Feldman, President

I would like to begin by congratulating our newly elected Midwest Board Members! Mary Pitsch from Sheboygan, WI has been elected for her second term as Treasurer, and Cheryl Hendrixson from Indianapolis, IN and Judy Mange from St. Louis, MO will be serving another two year term as Board of Directors. Congratulations to our new first time Board of Directors: Dorian Maples from Fort Wayne, IN; Sara Moore from State Line, IN; and Natalie Schneider from Overland Park, KS. I am looking forward to working closely with all of you!

We had a successful conference in October, 2014 in Excelsior, Missouri thanks to the hard work of Annice Davis-White and her conference committee. The conference had informative speakers and we even had the fortune of hearing about “The Spirituality of Care Management” from Ruth Cohen one of our Midwest Chapter founders. Some of us were able to learn about the formation of our Chapter from Ruth prior to her presentation. It is always so interesting to learn about the history of our Association.

We are now actively working on our 2015 annual conference to be held October 23 and 24, 2015 in Chicago, Illinois under the leadership of Kim Hand who is our conference chair. We are well under way with many sponsors and most of our speakers lined up.

The Midwest Chapter Board of Directors met in Chicago the weekend of February 20-21, 2015 for our annual retreat. Phyllis Brostoff, from Milwaukee, Wisconsin graciously gave up her Friday afternoon to share with the Board her thoughts and insights as we began our discussion on merging with National. We will be forming a task force to explore and better understand this process.

During our Retreat, we reviewed and finalized our 2015 Strategic Plan as well as our 2015 Budget.

The Midwest Board is also working on identifying and then hiring a Virtual Administrative Assistant to assist us with our E-Blasts and conference related tasks. It is time for our Chapter to hire someone to take over some of the work that our Board of Directors is doing on a voluntary basis. Our ultimate goal is for our Board of Directors to be able to spend more of their time on the Unit level in direct contact with our members instead of spending time on administrative tasks. To this end, we are working on developing ideas as to how to help grow our Association.

We continue through the leadership of Annice Davis-White with monthly Peer-Case Conference calls. Often there are 10 to 12 persons participating in the call. Those who participate gain knowledge that they take back with them and use in their practices.

Our Units continue to be busy with educational programs and networking. And the Unit members are anxiously awaiting the final Branding roll out in order to share our new brand with professionals and the general public they work with.

This is such an exciting time for NAPGCM!!!

New England | Mary Anne Wonn, President

The New England Chapter had to delay their January Annual Business Meeting until February due to the snow. It has been quite the Winter even for us hardy New Englanders. We are all anxiously awaiting Spring!

We had a great turn out at our Annual Meeting. We had several guests and new members in attendance. A special
thank to Debbie Gitner who served as Chapter President - 2014. She was very committed and brought positive energy to the Chapter. Our Chapter had a very successful year!

Our October Bi Annual Conference “The Many Faces of Care Management” was a great success. This was the most financially successful conference to date. Many thanks to Kate Granigan and Mary Jo Boynton, our Conference Co-Chairs and the Conference Committee for providing an outstanding Conference. Their hard work and enthusiasm made it all happen.

Our PR Committee has encouraged all Chapter members to participate on LinkedIn, Facebook, and Twitter. The goal is to publish a large number of continuous digital media posts within the time frame of April and May when the new branding announcement takes place. It is very important for all of us to submit articles, blogs, and white papers.

National will be providing new Chapter materials reflecting our new branding.

In February members of GCMNE received a survey from the Board of Directors asking their opinions and input on the current Chapter Board’s operations. Most importantly we wanted to hear what our members would like to see from their Chapter and how we can improve.

55 Surveys were returned out of 230. 10 questions were asked of the members. Summary of results are the following: Members want remote access for our monthly programs, assistance with NAPGCM rebranding efforts; review time and location of meetings. Members gave suggestions of topics for monthly programs and biannual conferences. Members asked for individual assistance with their practice and mentoring. The respondents were positive and appreciative about their Chapter. This survey will assist us meet the needs of our Chapter members. Many thanks to Susan Lewin, board member, who created the survey and compiled the results.

The Technology Committee continues to update our website and will make changes as directed by National.

The Program Committee has provided a number of wonderful programs for the upcoming months. Many thanks to Lindsay Brennan, Chair. She will be moving in a few months. A warm welcome to new Chair Meredith Patterson.

Kaaren Boothroyd made a presentation to our board about merging with National in January. It was a very informative and we appreciated her taking the time to present to us. National is reviewing our Chapter proposal and we will further discuss as a board.

We are looking forward to another successful year as a Chapter. This is an exciting time for our profession. The branding initiative will spotlight the wonderful work we all do for clients and families.

New York | Arleen Stern, Vice-President

The NYGCM Chapter has been keeping busy these past months. We have had two excellent programs, which drew many members in person and via computer to hear and see our meetings. In January, an IT expert spoke on Cyber Security and the GCM, outlining ways to keep our material and clients safe in this more complex world. In March, a panel spoke on, “Should I include Guardianship in my practice?” Numbers of our members are involved in guardianship, and gave of their time to discuss their work in this important and at times difficult arena.

The Chapter has been preparing for the branding change. We will be keeping our members informed on what we learn at the national conference, to help with thinking about what to call ourselves, what to think about in making up new materials, etc. It’s an exciting time for the chapter. We look forward to the National Conference, and are hopeful that we will host a strong contingent.

Inspired by last year’s national conference, our Chapter will be hosting Teepa Snow in the fall of 2015. We will be getting the information to all, as many people will want to come from near and far to hear Teepa’s wisdom.

And we will be conducting a Survey Monkey questionnaire to hear what our members are up to, and what they would like from us. The survey was put together by Anne Sanevero and Naomi Landesberg. We are very interested in hearing about what connects our members to us, and what they expect from us. We also will invite membership to join our committees and in the adventure of being part of our local group.

Southeast | Amy L. Natt, President

The Southeast Chapter is continuing to focus on growth through our 6 units across North Carolina, South Carolina, Tennessee, and Georgia. We welcomed 5 new members in February and are looking forward to continuing this trend. Our units are working together to increase community awareness and educate consumers on the benefits of working with an Aging Life Care Professional. As we continue to discuss the branding changes, we are sharing ways that we plan to implement these changes into our own practices. We are looking forward to developing new materials and displays that showcase our new logo and branding verbiage to use at local trade shows and educational seminars. This year the SE chapter conference will be held in exciting Atlanta. We are thrilled to be returning to this area and looking forward to what that
The excitement and enthusiasm of our leadership and representatives is infectious and encouraging. We are in good hands moving forward and this year is one of positive change that will help advance our profession as a whole. It is agreed that it will take a tremendous effort to build the ALCA brand but there is a solid plan in place to do just that! It will take all of us working together through social media, networking, and our chapters to successfully implement this change. Our goal as a chapter will be to support that national effort, while also focusing attention on what type of support our individual members need. Your chapter, committee, and unit leaders are in place to provide that support and together we can all work to educate the community on so many levels to promote our profession. You will find that we have active Facebook, Twitter, and LinkedIn accounts that you can connect with. Please watch for emails from the chapter as well as e-flashes from National so that we gain your feedback and keep you informed as we tackle 2015!

For any questions regarding the SE chapter, units, or committees, please contact President of SE chapter, Amy Natt at AmyN@AgingOutreachServices.com

Western Region | Ann Bradford, President

We are off to an exciting start in 2015 with our new board of directors. All of the committees have chairs and participants who are bringing their energy and fresh ideas to the team.

Lisa Mayfield, Past-President, is leading the way on our upcoming merger with National. She is putting all the pieces together to make the transition as seamless as possible for our targeted 2016 completion date.

Our first Chapter webinar is scheduled for March 18, 2015. Ethicist Vicki Kind is presenting “Professional Ethics: The Practitioner’s Obligations and Strategies for Success.” The webinar committee and the board are committed to providing as much continuing education as possible to our members.

The 2016 Conference is set for November 5-7th in Portland, Oregon. The planning committee is already working away to make sure the conference is a success.
NAPGCM Members in the News

- Kay Paggi was quoted in “Compassion fatigue’ can easily hurt caregivers’ health, and more” which was published in The Dallas Morning News on March 15, 2015

- Linda Fodrini Johnson was quoted in “Living will? What you must know” which was published in Consumer Reports On Health March 2015
  http://www.consumerwatch.org/publications/prepare-papers-now-end-life/289306/

- Debra Hanish-Shreyer was quoted in “Adult Living: Planning for long-term care” which was published in the Albany Times Union on February 19, 2015

- Buckley Fricker was quoted in “Crowdfunding helps manage health costs” which was published in the Herald Tribune on February 17, 2015
  http://health.heraldtribune.com/2015/02/17/crowdfunding-helps-manage-health-costs/

- Emily Saltz was quoted in “How to Find the Best Assisted Living Community for You” which was published in the US News & World Report on February 13, 2015
  http://money.usnews.com/money/personal-finance/articles/2015/02/13/how-to-find-the-best-assisted-living-community-for-you

- Barbara Trimble and Mary Boucher were quoted in “Dementia expert named medical director of Extended Family” which was published in Seacoast Online on February 8, 2015
  http://www.seacoastonline.com/article/20150208/NEWS/150209389/101171/

- Jan Somers was quoted in “Taking action on parent care: Siblings can try several methods to make sure decisions are made harmoniously” which was published by The Santa Clarita Valley Signal on February 8, 2015
  http://www.signalscv.com/section/68/article/132795/

- Peter Silin was quoted in “‘We’re not prepared’: Health care shockers threaten your retirement” which was published by the Financial Post on February 4, 2015
  http://business.financialpost.com/2015/02/04/were-not-prepared-health-care-shockers-threaten-your-retirement/

- Buckley Fricker was quoted in “Managing Health Costs With Crowdfunding” which was published in the NY Times on January 30, 2015
  http://www.nytimes.com/2015/01/31/business/managing-health-costs-with-crowdfunding.html?_r=0

- Susan Birenbaum was quoted in “Dealing with the Infirmit: Older Building Residents & Geriatric Care” which was published in Habitat on January 29, 2015
  http://www.habitatmag.com/Publication-Content/Legal-Financial/2015/January/Coping-with-Older-Communities#.VnrOAqf940

- Joan Merrill was quoted in “Care Manager At New Canaan’s Waveny LifeCare Manages ‘Unthinkable’ Issues” which was published in the Norwalk Daily Voice on January 28, 2015

- Elaine Gunter was quoted in “Private day care — The emerging option for Alzheimer’s patients” which was published in the Rome News Tribune on January 20, 2015
  http://www.northeastgeorgianews.com/rome/news/local/private-day-care-the-emerging-option-for-alzheimer-s-patients/article_3bc4ab6-04b5-11e4-92f6-a3f5e2c64084.html

- Dawn Thomas was quoted in “Morris therapists go mobile as seniors age in place” which was published in the Daily Record on January 18, 2015

- Rita Avramov was quoted in “Survey investigates why elderly parents often reject help from their kids” which was published in The Jerusalem Post on December 14, 2014

- Sue Coyle was quoted in “Holidays a good time to check on elderly” which was published in the Post Crescent on November 28, 2014

- Stella Nsong was quoted in “You’re at Retirement Age but Haven’t Saved Enough: What Now?” which was published in US News and World Report on November 13, 2014

- Ellen Waldman is the author of a weekly column in the Ashland Daily Tidings
  http://www.ashlanddailytidings.com/apps/pbcs/dll/search?q=ellen%20waldman%26Tidings auctions%2324&Start=0&execute=1&BuildNavigators=1&Category=

NAPGCM, the NAPGCM Website and geriatric care managers were listed or noted as resources in:

- “Traveling Panel Sheds Light on Senior Health Care” was published by the Chicago Tribune on March 2, 2015

- “Consumer Watch: Prepare papers now for end of life” was published by the Times Free Press on February 22, 2015

(continued on page 12)
• “Who is your adviser coordinator?” was published by the Green Bay Press Gazette on February 14, 2015
  http://www.greenbaypressgazette.com/story/money/2015/02/14/adviser-coordinator/23326363/
• “Must-have high tech tools for caregivers” was published by Harvard Health Publications on February 9, 2015
  http://www.health.harvard.edu/staying-healthy/must-have-high-tech-tools-for-caregivers
• “Long-distance caregiving: Tips on caring for elderly parents from afar” was published by the Southeastern Missourian on February 2, 2015
  http://www.semissourian.com/story/2161780.html
• “How To Talk About Elder Care” was published by Insurance News Net on January 29, 2015
  http://insurancenewsnet.com/oarticle/2015/01/29/how-to-talk-about-elder-care-a-589074.html#.VP3mPvnF8Q0
• “When should I start thinking about hospice care, for myself or a loved one?” was published in the Washington Post on January 26, 2015
  http://www.washingtonpost.com/national/health-science/when-should-i-start-to-think-about-hospice-care-for-myself-or-a-loved-one/2015/01/26/d5cc9bf0-8a08-11e4-a085-34e9b90958_story.html?tid=hpModule_9d3add6c-8a79-11e2-98d9-3012c1cd8d1e
• “Planning to have ‘the talk’ with senior parents? How to begin” was published in ABC Newspapers on January 15, 2015
  http://abcnewspapers.com/2015/01/15/planning-to-have-the-talk-with-senior-parents-how-to-begin/
• “How to Stretch Your Health-Care Dollars” was published in The Wall Street Journal on January 4, 2015
• “Veterans Journal: Truman’s Christmas message rings true today” was published in the Providence Journal on December 29, 2014
• “Geriatric Care Management Can Improve Elder Care” was published on December 23, 2014
• “Starting a conversation on relatives’ long-term care wishes” was shown on TV 11 on December 16, 2014
• “Elder guardianship: Where to learn more” was published in the Herald Tribune on December 8, 2014
  http://extra.heraldtribune.com/2014/12/08/elder-guardianship-learn/
• “A sibling’s guide to caring for aging parents” was published by PBS NewsHour on November 28, 2014
  http://www.pbs.org/newshourupdates/youre-sharing-care-aging-parents/
• “I am thinking of going into business for myself. What would some of the liability issues be?” was published in Nurse.com on November 27, 2014
  http://news.nurse.com/article/20141127/ALL04/141126006#.VHzDSDHF940
• NAPGCM issued a Press Release titled: “Two Leading Care Management Organizations Announce New Alignment to Boost Profession” on November 7, 2014
• “The OTHER Side of 50” was published in The Acorn on October 30, 2014

Awards and Recognition

• The University of Alabama at Birmingham (UAB) National Alumni Society awarded Gretchen Geagan as one of the UAB Excellence in Business Top 25 Class for 2015.

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Committee Reports

Digital Marketing Committee

Co-Chairs: Trish Colucci and Debra Feldman

In preparation for ALCA's national digital marketing campaign, the Digital Marketing Committee (DMC) has been meeting regularly and writing feverishly to generate content that will be used to increase brand awareness and understanding across key audiences. The Digital Marketing Committee is a merging of the public relations and research development committees of 2014.

The DMC is writing blog posts, white papers, and eBooks that will be pushed out strategically via the new ALCA website, social media outlets (Twitter, Facebook, LinkedIn), to bloggers, reporters, as well as targeted associations and thought leaders.

What is the Digital Marketing Campaign? Digital marketing will be an ongoing component of the overall association communication plan, however May and June feature an intense digital marketing push designed to meet several objectives:

- **Re-brand**: Convert NAPGCM online brand to Aging Life Care Association and increase awareness and understanding of this brand across key target audiences
- **Retain and expand online profile**: retain existing NAPGCM digital footprint and transfer to ALCA; expand ALCA digital footprint and visibility
- **Increase search power** with goal of having ALCA and ALCA practices hit page 1 on most important keyword searches e.g. Elder services, Senior Care, Senior Services, Care Management etc.
- **Increase lead generation** for ALCA members
- **Build ALCA Brand Leadership**: Build ALCA as the leader, trusted authority, and go-to resource for information and services that help families with aging adults tackle challenges and live well during the aging process
- **Build database for e-marketing**

**Social Media Marketing**: engaging in discussions and trending conversations related to ALCA work or content across all social media platforms (Face Book, LinkedIn, Twitter, Instagram, Pinterest)

**Search Engine Marketing (SEM)**: purchase of ADWORDS to insure ALCA leadership presence on important keyword searches – and potential use of paid FB and TW ads

**Re-Targeting** – pop-up ALCA messages/ads following ALCA website visitors, continuing the engagement with the goal of driving them to action

The digital marketing campaign and the content generated are an invaluable benefit to ALCA members. Members will now have automatic content that can be used on websites and in social media. By aligning and revising your website language, and by participating in social media, members will amplify the campaign efforts while increasing their own search power.

The Digital Marketing Committee includes: Trish Colucci (co-chair), Debra Feldman (co-chair), Amy Abrams, Susan Birenbaum, Phyllis Brostoff, Byron Cordes, Bunni Dybnis, Linda Fodrini-Johnson, Jullie Gray, Heather Imhoff, Beverly Bernstein Joie, Lisa Laney, Marie Leblanc, Frances Mir, Suzanne Modigliani, Catherine Rowlands, and Miriam Zucker.

Education Committee

Co-Chairs: Liz Barlowe and Deborah Fins

Committee members include Mary Ellen Brown, Vicki Karlovich, Judy Mange, Susan Murphy, Anne Recht and Anne Sansevero. Julie Wagner provides staff support.

The Education Committee has been relatively quiet since last June as the focus has been on the re-branding effort and development of our 2015 strategic plan. The Plan outlines several ambitious goals for the education effort. These include:

- To review and expand the Aging Life Care Association’s current educational programs and delivery of programs
- To ensure that the 8 core functional areas of Aging Life Care Management are covered
- To develop curriculum to prepare members for CMC certification
- To evaluate other organizations’ calls for speaker proposals and identify potential speakers to present at other conferences on behalf of Aging Life Care Association professionals

The Education Committee has also been charged with coordinating our work with the Webinar subcommittee, including researching better technology for the delivery of webinars.

Education is a major member benefit of NAPGCM. The goals of the committee, beyond what has been outlined above, are to oversee educational offerings of NAPGCM, evaluate existing offerings to determine if they should continue, be adjusted or be eliminated; and identify and implement new educational events to benefit members.

(continued on page 14)
At our June 2014 meeting, we agreed to continue with four programs offered at the National Conference (Care Management 101: Section 1 Clinical & Ethical and Section 2 Sales & Marketing, Care Management 201: Tools to Grow Your Business, Certified Member Roundtable and Xtreme Mentoring). Speakers have been identified for the 2015 intensives and the chairs will work with Kaaren Boothroyd to select the members to run the Roundtable and Xtreme Mentoring programs. Building a GCM Business (a 7 session program) has been offered twice in the past year and was sold out each time.

The committee will meet in mid-March to review a curriculum for use with CMC preparation and discuss how to offer this as a program next fall. We will also be discussing how to evaluate requests for speaker proposals from allied professional groups.

We are open to hearing from ALCA/NAPGCM members as to other ideas for educational offerings.

**Standards Committee**

*Chair: Charlene Proeger*

We recently completed a new standard: “Working with Clients under Court Jurisdiction.” This new standard addresses some of the challenges our members have encountered in these situations.

We also took a fresh look at Standard 11, Undertaking Decision-Making Authority. We added a guideline, clarified some wording, and altered the sequence of some guidelines, to provide a more orderly flow of the concepts.

The board has approved both the new and the revised standards. The booklet of the Code of Ethics and Standards of Practice is being revised to include these standards. The new booklets will be available at the conference in Denver.

Our committee members are: Charlene Proeger, chair, Nancy Avitabile, Deborah Fins, Miriam Oliensis-Torres, Stephanie Swerdlov and Mary Jo Boynton.

The text of both standards follows:

**Standard 12 | Working with Clients under Court Jurisdiction**

**Standard**

When working with Guardians, Conservators and/or in a court appointed capacity, the Aging Life Care Professional is obligated to operate within the court system while adhering to ALCA’s Standards and Ethics.

**Rationale**

Providing services to clients under court jurisdiction adds a layer of complexity since each of the stakeholders have their own professional or personal perspectives. The client and/or family may also feel a loss of control as the court is the final decision making authority.

**Guidelines**

A. The client is the person whom the court has determined to be in need of protection.

B. The client system may include but is not limited to:
   1. Judge and/or Court Representative,
   2. Guardians or Conservators,
   3. Attorneys and/or guardian ad litem,
   4. Family or informal support system,
   5. Healthcare Providers,
   6. Adult Protective Services

C. The Aging Life Care Professional should strive to understand and articulate his/her roles and responsibilities, and clarify expectations within the context of the legal and client systems while continuing to follow our Standards of Practice and Code of Ethics.

D. The Aging Life Care Professional should communicate frequently and clearly with the legal decision maker(s) and strive to advocate for the vulnerable person.

E. The Aging Life Care Professional should collaborate with the legal decision maker(s) to identify and address potential challenges to service which may include but are not limited to:
   1. Complex or conflictual dynamics in the client system.
   2. Availability, access and/or control of financial resources
   3. Ongoing legal disputes
   4. Lack of appropriate and available care options

F. In consultation with the legal decision maker(s), the Aging Life Care Professional should reach out to families if/when appropriate.

G. When the Aging Life Care Professional is the guardian, s/he should clearly differentiate between the guardian role and the Aging Life Care role. It is important to avoid even the appearance of conflict of interest or a dual relationship (see Standard 5).

H. If the situation becomes untenable the Aging Life Care Professional should notify the legal decision maker of intent to terminate.

**Standard 11 | Undertaking Decision-Making Authority**

**Standard**

The Aging Life Care Professional who accepts decision-making authority with respect to healthcare decisions and/or financial management on behalf of a client should act only within his/her knowledge and capabilities and avoid any activities that might suggest a conflict of interest.

**Rationale**

In accepting the role of decision maker for the client, the Aging Life Care Professional has the responsibility to represent the (continued on page 15)
client’s wishes to the greatest extent possible and guard against making decisions based on his/her own values (see Standard 2).

Guidelines (guidelines were moved around)

A. The Aging Life Care Professional should know and comply with relevant State and Federal laws and statutes.

B. Prior to accepting the role of proxy or surrogate, the Aging Life Care Professional should ascertain and document the client’s wishes and values.

C. The Aging Life Care Professional should have legal documentation of the authority granted.

D. The Aging Life Care Professional should establish safeguards to avoid impropriety or any possible appearance thereof.

E. The Aging Life Care Professional should avoid, where possible, self-payment. If the Aging Life Care Professional has no alternative than to assist the client to pay for Aging Life Care services, it is recommended that a third party provide oversight for these transactions.

F. Documentation of all actions should be maintained and made available to authorized parties.

G. Examples of authority include but are not limited to:

1. Health Care Decision Making
   a. Health Care Surrogacy (HCS) or Health Care Proxy (HCP)
   b. Health Care Power of Attorney (HPOA)
   c. And other similar authority

2. Financial Decision Making
   a. Power of Attorney (POA)
   b. Representative, Payee
   c. And other similar authority

Webinar Subcommittee
Jan Welsh, Co-Chair

Past webinars are available for purchase at the NAPGCM website. If you see one you wish you hadn’t missed, you can still get it. Below is a list of what we have offered since last fall. Stay tuned this summer for a special event with Dr. Dennis McCullough on Slow Medicine.

- Implementing Accessibility and Safety for the Long Term Care in the Home by Carolyn Sithong, Home for Life Design, LLC
- Clinical Webinar - Dental Care in Older Adults - The Underappreciated Domain by Dr. Christine Harrington, DDS, Ohio State University
- In Home Caregivers: Advantages of Hiring Legally and Consequences of Hiring Under the Table by: Robert (Bob) King, Esq.
- The Silver Tsunami: The New Face of Addiction by: John Dyben, Director of Spiritual Care & Wellness, Hanley Center for Addiction Treatment
- Protecting Clients with Dietary Needs: Culinary skills & Basic Nutrition for In-home Caregivers by: Chef Beth Scholer
- 5 Tips to Get Your Business Fit by: Risa Baker, Partners 31

For input or questions, please contact webinar committee members:
Jan Welsh, jan@1specialcare.com & Trish Colucci, trish@peaceagingcare.com, Co-Chairs
Karin Miller...millerkarin2@gmail.com
Laurie Strom....laurie@caremanagers-nw.com
Susan Valoff...svaloff@eldercareguides.com

Thursday, May 28, 2015
Long-Term Care Insurance: Helping Clients Get the Most From Their Policy
NAPGCM Business Webinar
Jody Hubbard | Jody Hubbard Long Term Care Planning | Encinitas, CA
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Wednesday, July 22, 2015
Empowering Caregivers Who Are Facing Difficult Decisions
NAPGCM Clinical Webinar | Viki Kind, MA, Kind Ethics
SPONSORED BY

Summer, TBD
***SPECIAL EVENT***
Slow Medicine | Dennis McCullough, MD | Details coming soon

September, 2015
Labor Law | NAPGCM Business Webinar
Dennis J. Alessi, Esq., Mandelbaum Salsburg, Roseland, NJ
SPONSORED BY

October 21, 2015
Frontotemporal Degeneration and the Need for Specialized Services in Our Clients
NAPGCM Clinical Webinar
Sharon S. Denny, MA
The Association for Frontotemporal Degeneration | Radnor, PA
SPONSORED BY
NAPGCM 2015 Strategic Plan Update

1. **Build and Brand the Organization, Profession, and Association**
   a. Develop plan to implement new Association Brand both internally and externally
   b. Strengthen leadership role and alliances to support and influence the industry segment
   c. Combine the Public Relations and Research Development committees in order to develop a mechanism to carry out Digital Marketing

2. **Build Association by retaining and increasing membership.**
   a. Examine the membership categories/eligibility/naming/dues
   b. Explore opportunities for expansion through five identified growth pools (AJFCA, PPAI, CSA, NASW, NACC)
   c. Continue to review member benefits to ensure we are meeting the needs to grow our membership

3. **Restructure organization to further strengthen a unified association**
   a. Build more local member connections and engagements
   b. Consider reduction in Board size and alternative organizational structure
   c. Continue to explore mergers with chapters and national

4. **Develop educational strategies to promote professional competency**
   a. Create Aging Life Care Institute – *revisit mid-2015*
   b. Review and expand current educational programs and delivery; consider following tasks

5. **Review current Certification policies – *revisit mid-2015***
   a. Evaluate which certifications to accept for membership
   b. Examine current certification standards and make recommendations

**PARKING LOT** (to be considered during Oct 2015 Strategic Planning): Benchmarking; Public policy consultant; Public Relations-traditional; Outcomes research

*Developed by NAPGCM Board of Directors at Board of Directors Retreat, September 14, 2011 at Catamaran Resort, San Diego, California; Updated October 17, 2012 at the Westin Indianapolis, Indianapolis, Indiana; Amended January 25, 2013 at Tempe Mission Palms, Tempe, Arizona; Amended November 6-7, 2013, San Antonio, TX; amended October 18, 2014, Loews Ventana Canyon, Tucson, AZ; amended January 21 & 22, 2015, Sarasota, FL

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**Have Questions?** Contact us at 520.884.4240 or info@naccm.net