

2010 Conference
Adapting to Challenges in
Hard Times through
Resource Development

Thursday and Friday
November 18-19, 2010
Older Persons' Commission
650 Letica Drive
Rochester, MI 48307

Conference Program and Registration
Seats are limited.

Registration deadline is Wednesday, November 10, 2010

Presented by:
The Michigan Office of Services to the Aging



With support from:
Priority Health
Older Persons' Commission

Adapting to Challenges in Hard Times through Resource Development



November 18-19, 2010
Older Persons' Commission
650 Letica Drive, Rochester, MI 48307

The Office of Services to the Aging (OSA) invites you to register for this informative conference.

OVERALL OBJECTIVES

A challenging financial market, increasing aging population, and expanding service network for persons with disabilities are critical issues facing Michigan and the Nation. Providers of services need to look at what they are currently doing and realign their services/businesses and “re-invent” themselves. This “re-inventing” is a crucial approach to further ensuring high quality services that are responsive to consumers/participants and local communities.

OSA brings to you experts who will discuss innovative ways to increase revenue streams; gain commitment from key stakeholders; develop business plans; establish active boards to include corporate and community leaders; and more.

SPONSORS

The Office of Services to the Aging gratefully acknowledges support and other contributions from Priority Health and the Older Persons' Commission.

QUESTIONS

For questions or accommodation requests, e-mail Lanumg@michigan.gov or call (517) 241-2066.

INTENDED AUDIENCE

The conference is intended for the aging and disability networks, Area Agency on Aging administrators, leaders of Centers for Independent Living, board members, Commission and Councils on Aging administrators, consumers/participants, non-profit organizations, nutrition providers, planners, senior center directors and staff, and others who may be interested. Limited stipends are available for consumers/ participants. If interested, call Gloria Lanum at (517) 241-2066.

PLANNING COMMITTEE

Office of Services to the Aging

Sharon L. Gire – Director
Peggy J. Brey – Deputy Director
Holliace Spencer – Division Director
Joanne Bump – Conference support
Chris Korloch – Conference support
Gloria Lanum – Conference support
Drew Walker – Conference support
Pamela Webb – Conference support

Older Persons' Commission

Marye Miller – Executive Director

Adapting to Challenges in Hard Times through Resource Development Conference

Agenda at a Glance

Thursday, November 18, 2010

Auditorium

8:00-9:00 AM **Registration/Continental Breakfast**

9:00-9:30 AM **Welcome & Opening Remarks**

Marye Miller, Executive Director, Older Persons' Commission
Sharon L. Gire, Director, Office of Services to the Aging
Holliece Spencer, Division Director, Office of Services to the Aging

9:30-10:30 AM **Keynote Address: Time to Reinvent**

Erika Walker, Executive Director, SAGE WAVE Consulting, LLC

10:30-12:00

Workshop 1 **Making a Profit in a Non-Profit World**

Robert Littke, President, Senior Services, Inc.

Workshop 2 **Multiple Funding Sources for Nutrition**

Karen Jackson, Contract Manager-Nutrition Services, Area Agency on Aging 1-B

Jim Allen, Nutrition Director, Tri-County Office on Aging
Sharon TerHaar, Executive Director, Age Well Services of West Michigan

12:00 Noon

Lunch in Auditorium

1:00-2:30 PM

Workshop 3 **Overview: "Building a Business Plan: Part One"**

Erika Walker, Executive Director, SAGE WAVE Consulting, LLC

Workshop 4 **Building Business Relationships with the Health Care System**

Faiz Eshaki, Senior Vice-President/CFO, Detroit Area Agency on Aging
Marye Miller, Executive Director, Older Persons' Commission
Cindy McKenna, Clinical Outreach Coordinator, Crittenton Wellness Center

2:30-4:00 PM

Workshop 5 **Aging Services Strategic Partnerships**

Karla Fales, CEO, Region 3B Area Agency on Aging
Rod Auton, Executive Director, CentraCare
Linda Grap, Director, Senior Health Partners
Pam Curtis, Executive Director, Senior Resources of West Michigan
Bob Mills, Executive Director, LifeCircles PACE

Workshop 6 **Centers for Independent Living (CILs): Who Are They and How They Address These Economic "Hard Times"**

Mike Zelle, Director and Vicki Sacharski, Events Specialist and Executive Assistant, The Disability Network

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Agenda at a Glance

Thursday, November 18, 2010 continued

- 4:00-5:30 PM** **Workshop 7** **Fundraising or Fund Raising: A Senior Center Experience**
Christy Weisenbach and Fran Wolbert, Sponsorship/Marketing and Special Events, Older Persons' Commission
- Workshop 8** **Developing a Charitable Giving Strategy**
Doug Chalgian, Elder Law Attorney, Chalgian & Tripp Law Offices, PLLC
- 5:30 PM** **Auditorium** **Closing Remarks – Erika Walker**

Friday, November 19, 2010

Auditorium

- 8:00-9:00 AM** **Registration/Continental Breakfast**
- 9:00-9:30 AM** **Welcome & Opening Remarks**
Marye Miller, Executive Director, Older Persons' Commission
Holliace Spencer, Division Director, Office of Services to the Aging
- 9:30-10:00 AM** **Keynote Address**
Erika Walker, Executive Director, SAGE WAVE Consulting, LLC
- 10:00-10:30 AM** **Pre-mail Survey**
Drew Walker, Office of Services to the Aging
- 10:30-12:00** **Step by Step Methods: "Building a Business Plan: Part Two"**
Erika Walker, Executive Director, SAGE WAVE Consulting, LLC
- 12:00 Noon** Lunch in Auditorium
- 1:00-2:30 PM** **Workshop 1** **Identifying New Funding Sources**
Laura Newsome, Executive Director, The Council on Aging, Inc., serving St. Clair County
Lynn Kellogg, Executive Director, Region IV Area Agency on Aging
- Workshop 2** **Leveraging Your Resources**
Kathy Boles, Executive Director, Valley Area Agency on Aging
Bonnie Forbes, Executive Director, Wexford County Council on Aging
- Workshop 3** **The Role of the Board in Program and Fund Development**
Paul Bridgewater, President/CEO, Detroit Area Agency on Aging
Andrea Johnson, Director of Fund Development, Detroit Area Agency on Aging
Pam Curtis, Executive Director, Senior Resources of West Michigan
Jan Stermin, Chairperson, Senior Resources Board of Directors
- 2:45 PM** **Auditorium** **Closing Remarks – Erika Walker**
Complete your Evaluation

Adapting to Challenges in Hard Times through Resource Development Conference

Conference Agenda

Thursday, November 18, 2010

Auditorium – All Conference Participants

Welcome & Opening Remarks

Keynote Address: Time to Reinvent

This presentation will review the three conference “walk away” messages which are: 1) The aging and disability network needs to look broadly at economic sources in their community and integrate into their strategic and business plans, 2) Understand the economic resources of the participant population in their service areas, and 3) Build a business plan that includes diverse funding. The Keynote Address will focus on it’s “Time to Reinvent” as an important tool. "Reinvention" should start by looking at all community needs and opportunities... crossing all economic levels and capitalizing on diverse funding methods. The steps necessary to accomplish these goals are: 1) Developing/building community collaborations, 2) Strategic planning vs. business planning...what is the difference?...which focus should you take?, and 3) Enhancing/fine tuning your strategic and business planning efforts....how to build on their strengths and fill in the missing pieces.

Presented by: Erika Walker, Executive Director, SAGE WAVE Consulting LLC, Gainesville, Georgia

Workshops

Workshop 1

Making a Profit in a Non-Profit World

In this workshop, participants will get an overview of the concept of serving the private pay customer. As organizations serve those with an ability to pay for their services, they not only meet the needs of older adults and people with disabilities, but they also generate funds to serve even more low-income clients. Indeed, offering services to customers who have the ability to pay for services benefits the clients who need assistance, offers the organization the capability to serve more low-income clients, and builds greater organizational stability and independence. But how can a non-profit organization justify making a “profit?” This presentation will cover topics including: defining the private pay market, examining your non-profit status and assumptions, determining the true cost of services provided, identifying and overcoming obstacles, and designing payment structures and developing a business plan. Actual examples of proven fee-for-service programs offered by Senior Services will be shared.

Presented by: Robert W. Littke, President, Senior Services, Inc.

Adapting to Challenges in Hard Times through Resource Development Conference

Workshops continued

Thursday, November 18, 2010

Workshop 2

Multiple Funding Sources for Nutrition

This presentation will discuss experiences balancing the Older Americans Act nutrition service with varied funding options. Speakers will describe why they chose to do this, how it has been responsive to participants, and how use of varied funding streams have contributed to their organizations' mission.

Presented by: Karen Jackson, Contract Manager-Nutrition Services, Area Agency on Aging 1-B
Jim Allen, Nutrition Director, Tri- County Office on Aging
Sharon TerHaar, Executive Director, Age Well Services

Workshop 3

Overview: "Building a Business Plan: Part One"

This workshop will provide an overview of three arenas to help you reinvent, including Developing and Building Community Collaborations, Strategic Planning vs. Business Planning: What is the Difference? Which focus should you take?, and Enhancing/Fine Tuning your Strategic and Business Planning Efforts: How to Build on Strengths and Fill in the Missing Pieces.

Presented by: Erika Walker, Executive Director, SAGE WAVE Consulting, LLC

Workshop 4

Building Business Relationships with the Health Care System

This panel will share their organization's experience in building business relationships that are responsive to the older adult and community needs, and discuss financial diversity of their organizations, and outline steps needed to develop sustainable working relationships.

Presented by: Faiz Esshaki, Senior Vice-President/CFO, Detroit Area Agency on Aging
Marye Miller, Executive Director, Older Persons' Commission
Cindy McKenna, Clinical Outreach Coordinator, Crittenton Wellness Center

Workshop 5

Aging Services Strategic Partnerships

The panel will introduce two unique community partnerships; including why they came together, the benefits to participants, their organizations and their communities, as well as some pitfalls to avoid to ensure sustainability of their partnerships. Insights into what makes these partnerships an innovative strategic option will also be shared.

Presented by: Karla Fales, CEO, Region 3B Area Agency on Aging
Rod Auton, Executive Director, CentraCare
Linda Grap, Director, Senior Health Partners
Pam Curtis, Executive Director, Senior Resources of West Michigan
Bob Mills, Executive Director, LifeCircles PACE

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Workshops continued

Thursday, November 18, 2010

Workshop 6

Centers for Independent Living (CILs): Who Are They and How They Address These Economic “Hard Times”

This presentation will cover multiple fund raising strategies used for program expansion and increased services to participants.

Presented by: [Mike Zelle, Director, The Disability Network](#)
[Vicki Sacharski, Events Specialist and Executive Assistant, The Disability Network](#)

Workshop 7

Fundraising or Fund Raising: A Senior Center Experience

This presentation will provide an example of a self-sufficient senior center, including experiences, lessons learned and planned future approaches to fund raising. From the basic spelling of fundraising to the attention to details of a black tie event...we hope to get you motivated to raise funds...everyone can do it!

Presented by: [Christy Weisenbach and Fran Wolbert, Sponsorship/Marketing and Special Events, Older Persons' Commission](#)

Workshop 8

Developing a Charitable Giving Strategy

This presentation will address the steps necessary to have a charitable giving practice and the benefits of this strategy, including how it fits with the organization's mission and how it can be instrumental in meeting the needs of the community and the organization.

Presented by: [Doug Chalgian, Elder Law Attorney, Chalgian & Tripp Law Offices PLLC](#)

Closing Remarks

Presented by: [Erika Walker, Executive Director, SAGE WAVE Consulting, LLC](#)

Thank you to our speakers for their time and willingness to share their information and experiences. Also, thanks to all of you who participated in day one of this conference. We hope the workshops were helpful for you. Please take a few moments to complete workshop evaluations. If you will not be able to join us tomorrow, please complete the overall conference evaluation in your packet.

*Enjoy the rest of the evening. We're glad you could join us!
Office of Services to the Aging*

Adapting to Challenges in Hard Times through Resource Development Conference

Conference Agenda

Friday, November 19, 2010

Auditorium – All Conference Participants

Keynote Address

This presentation will review the three conference “walk away” messages and how they relate to the various workshops. The Keynote Address will focus on reviewing the building blocks for a responsive business plan and how to be sustainable, and introduce the importance of data.

Presented by: Erika Walker, Executive Director, SAGE WAVE Consulting, LLC

Pre-mail Survey

This presentation will cover analysis of the preliminary findings and a discussion of how OSA and the aging and disability networks can use this data to complement their business plan.

Presented by: Drew Walker, Office of Services to the Aging

Step by Step Methods: “Building a Business Plan: Part Two”

In this presentation, participants will learn how to enhance their existing business plans in detail. Bring your specific issues and concerns and get them answered during this session. Find out answers to questions such as "How do I reinvent my organization?" "How do I develop a better needs assessment?" "Where do I find partners in the community?" "How do I build financial sustainability?"

Presented by: Erika Walker, Executive Director, SAGE WAVE Consulting, LLC

Workshops

Workshop 1

Identifying New Funding Sources

This presentation will share unique experiences identifying new and various funding sources and business opportunities. Participants will learn how the speakers approached each potential funding source, and hear about successful and unsuccessful experiences.

Presented by: Laura Newsome, Executive Director, The Council on Aging, Inc., serving St. Clair County
Lynn Kellogg, Executive Director, Region IV Area Agency on Aging

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Workshops continued

Friday, November 19, 2010

Workshop 2

Leveraging Your Resources

This presentation will focus on millage initiatives and how to sustain them in future years, and other business opportunities leveraged in local communities.

Presented by: Kathy Boles, Executive Director, Valley Area Agency on Aging
Bonnie Forbes, Executive Director, Wexford County Council on Aging

Workshop 3

The Role of the Board in Program and Fund Development

The support of the Board of Directors is essential to the success of any organization and without that support and leadership the most well-intentioned efforts and projects can fail. This presentation will focus on board membership and composition, specific roles, and why boards are so important to the success of the organization's overall business plan and future.

Presented by: Paul Bridgewater, President/CEO, Detroit Area Agency on Aging
Andrea Johnson, Director of Fund Development, Detroit Area Agency on Aging
Pam Curtis, Executive Director, Senior Resources of West Michigan
Jan Stermin, Chairperson, Senior Resources Board of Directors

Closing Remarks

Presented by: Erika Walker, Executive Director, SAGE WAVE Consulting, LLC



Thank you to our speakers for their time and willingness to share their information and experiences. Also, thanks to all of you who participated in this 2-day conference. We hope the workshops were helpful for you. Please take a few moments to complete workshop evaluations and the overall conference evaluation in your packet.

*We're glad you could join us!
Office of Services to the Aging*

Adapting to Challenges in Hard Times through Resource Development Conference

HOW TO REGISTER

Registration Fee is \$40.00 per person. The fee includes admission to all sessions, workshops, two continental breakfasts, two lunches, all breaks and materials. Registration form must be received by Wednesday, November 10, 2010.

Complete the attached Registration Form and return with payment.

PAYMENT METHODS

Please do not send cash.

1) BY CHECK

Make check payable to: *State of Michigan*. Please write 'Hard Times Conf' on the memo line of your check. **MAIL** your completed Registration Form with payment to:

Michigan Dept Community Health
Accounting Division
P.O. Box 30437
Lansing, Michigan 48909

2) BY CREDIT CARD

To pay by credit card go to:
<https://www.thepayplace.com/mi/dch/conference>.

After completing your online payment, then **MAIL** or **FAX** your completed Registration Form to:

Office of Services to the Aging
P.O. Box 30676
Lansing, MI 48909-8176
Fax (517) 373-4092

DO NOT send checks or credit card information to this address.

For additional Registration Forms visit:
www.michigan.gov/miseniors

CONFERENCE LOCATION

Older Persons' Commission
650 Letica Drive
Rochester, Michigan 48307
Tel: (248) 656-1403
www.opcseniorcenter.org

HOTELS

To search for hotels in the area, go to
www.hotels.com

Royal Park Hotel (866) 573-4235
Red Roof Inn (866) 925-8676
Courtyard by Marriott (866) 538-0294
Fairfield Inn By Marriott (866) 538-0315
Staybridge Suites Utica (866) 538-2362
Wingate by Wyndham (866) 539-0036
Best Western Palace Inn (866) 539-0036

CANCELLATION POLICY

Refunds are available until Monday, November 15, 2010, less a \$10 processing fee. A written notice of cancellation must be received by close of business on Monday, November 15, 2010. Cancellations can be faxed at (517) 373-4092 or e-mailed to:
Lanumg@michigan.gov.

If you do not cancel or do not attend the conference, payment is still required. Refunds will only be made if a written notice of cancellation is made PRIOR to November 15, 2010. Eligible refunds will be processed within 45 days after the conference.

*The Michigan Office of Services to the Aging
reserves the right to substitute or make changes
of any part of the conference
due to unforeseen circumstances.*

Conference Registration Form

Adapting to Challenges in Hard Times through Resource Development

November 18-19, 2010 • Older Persons' Commission, Rochester, Michigan 48307

To pay by check, return this form with payment of \$40 per person to: MI Dept Community Health, Accounting Division, P.O. Box 30437, Lansing, MI 48909. Make check payable to: **State of Michigan** and write 'Hard Times Conf' on the memo line. To pay by credit card, go to: www.thepayplace.com/mi/dch/conference. Upon receiving your registration, a confirmation will be e-mailed to you. Copy this form for additional registrants or visit www.michigan.gov/miseniors. Please print. Space is limited. Deadline: 11/10/2010.

First Name **Last Name** **Credentials/Title**

Organization

Address **City, State & Zip Code**

E-mail (Required) **Telephone (Required)**

Dietary or Other Accommodations: _____

Payment Method: **Check #** _____ **Amount \$** _____ **Credit Card Amount \$** _____

Please indicate the Workshops you plan to attend:

Thursday, November 18, 2010:

- | | | |
|---|--|---|
| <p>10:30-12:00 Noon
Choose either Workshop 1 or Workshop 2</p> <p>1:00-2:30 PM
Choose either Workshop 3 or Workshop 4</p> <p>2:30-4:00 PM
Choose either Workshop 5 or Workshop 6</p> <p>4:00-5:30 PM
Choose either Workshop 7 or Workshop 8</p> | <input type="checkbox"/> Workshop 1
<input type="checkbox"/> Workshop 2
<input type="checkbox"/> Workshop 3
<input type="checkbox"/> Workshop 4
<input type="checkbox"/> Workshop 5
<input type="checkbox"/> Workshop 6
<input type="checkbox"/> Workshop 7
<input type="checkbox"/> Workshop 8 | <p>Making a Profit in a Non-Profit World</p> <p>Multiple Funding Sources for Nutrition</p> <p>Overview: "Building a Business Plan: Part One"</p> <p>Building Business Relationships with the Health Care System</p> <p>Aging Services Strategic Partnerships</p> <p>CILs: Who Are They and How They Address These Economic "Hard Times"</p> <p>Fundraising or Fund Raising: A Senior Center Experience</p> <p>Developing a Charitable Giving Strategy</p> |
|---|--|---|

Friday, November 19, 2010:

- | | | |
|---|---|--|
| <p>1:00-2:30 PM
Choose either Workshop 1 or Workshop 2 or Workshop 3</p> | <input type="checkbox"/> Workshop 1
<input type="checkbox"/> Workshop 2
<input type="checkbox"/> Workshop 3 | <p>Identifying New Funding Sources</p> <p>Leveraging Your Resources</p> <p>The Role of the Board in Program and Fund Development</p> |
|---|---|--|