2025 AGING IN PLACE EXCELLENCE SUMMIT

September 15-16, 2025
Caesars Palace
Las Vegas, NV

Strategies for Home Care Management

SPEAKING FACULTY

Kate Granigan, MSW, LICSW, C-ASWCM
Chief Executive Officer
LIFECARE ADVOCATES
Fellow of the Leadership Academy of the Aging Life Care Association
Aging Life Care Association Board of Directors, President 2024

Marisa Scala-Foley
Director, Aging and Disability Business Institute
USAGING

Marybeth McMahon, BS, CPHQ, LSSGB
Director of Operations, Hospital Care at Home
CHRISTIANACARE CENTER FOR VIRTUAL HEALTH

Jeffrey Klein, FACHE
President & CEO
NEVADA SENIOR SERVICES INC.

Chris Berno
Chief Technology Officer
AMERICAN SOCIETY ON AGING

Steven Barlam, MSW, LCSW, CMC
Chief Executive Officer
JFS CARE
President
AGING LIFE CARE ASSOCIATION, 2025

Eric Marshall
CEO, Founder & Clinical Therapist
WARRIOR'S LEGACY CARE

Jatin Dave, MBBS, MPH, FACP
Chief Medical Officer, Government Products
UPMC HEALTH PLAN

Stephen C. Dorner, MD, MPH, MSc
Chief Clinical and Innovation Officer
MASS GENERAL BRIGHAM HEALTHCARE AT HOME

Alexander R. Levit, MD
Medical Director – Hospital at Home LPG Hospitalists
LEE HEALTH SYSTEM, INC.

Jennifer T. Szakaly, MA, CMC, NMG
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Tricia E. McVicker, JD, RN, BSN
Director of Nursing/In-House Counsel
HEROES HOME HEALTH

Dana Keilman
CEO & Co-Founder
MORNING LIGHT STRATEGY

David M. Posner, MBA
"Senior Care Ref"
3 POINT CARE CONSULTING

Shawn Bloom
President and CEO
NATIONAL PACE ASSOCIATION

Lynne Cote
Branch Manager
SENIOR HELPERS OF GREEN VALLEY

Nicole Howell
Director, Direct Care Workforce Development
NATIONAL COUNCIL ON AGING, INC.

Dana Keilman
CEO & Co-Founder
MORNING LIGHT STRATEGY

Tara Ballman
Aging-in-Place Business Development Director
LONGBRIDGE FINANCIAL

KEY HIGHLIGHTS

- Aging Well: Promoting Resilience, Connection, and Purpose in Later Life
- Building High-Performance Care Management Hubs: Where Clinical Excellence Meets Operational Efficiency
- Scaling Operations While Maintaining Quality
- Care Transitions & Complex Care Management: Building Revenue Through Clinical Excellence
- Technology Integration & Interoperability: Breaking Down the Silos
- Creating Sustainable Revenue Streams Beyond Traditional Home Care
- Building a Tech-Enabled Home Care Organization
- Building Sustainable Business Models: Revenue Diversification and Strategic Partnerships
- The Rise of Hospital-at-Home Programs: New Opportunities for Home Care
- How Hospital at Home Programs can Decrease Skilled Nursing Facility Utilization
- Building Solid Partnerships with Aging Life Care Managers®
- Risk Management & Compliance in the Digital Age

BRINetwork

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CONFERENCE WORKSHOP

Innovation and Marketing of Financial Services for Aging in Place
- MORNING LIGHT STRATEGY /LONGBRIDGE FINANCIAL

About the Conference

Business Research Intelligence Network presents a groundbreaking summit focused on the rapidly evolving aging-in-place market and home care management landscape. As the senior population continues to grow exponentially, the demand for innovative home care solutions has reached unprecedented levels, creating both opportunities and challenges for industry leaders.

This event brings together C-suite executives, operational leaders and senior management from home health agencies, home care organizations, hospitals, health systems and aging services providers. Through interactive sessions, real-world case studies and peer-to-peer networking, attendees will gain actionable insights from industry veterans on optimizing operations, driving growth and maintaining profitability in today's competitive marketplace. This is a must-attend event for VPs of Operations, Chief Operating Officers, Directors of Business Development, Hospital Executives, Health System Leaders, Regional Managers and other senior decision-makers responsible for strategic planning, revenue growth and operational excellence in home-based care delivery and aging services.

Industry experts will share their perspectives on market trends, business model innovation, workforce solutions, technology integration and regulatory compliance - providing you with the tools needed to succeed in this dynamic market. Join us to learn how to scale your operations, improve efficiency and deliver exceptional care while maintaining healthy margins.

Register Early & Save! Groups of 3 or more can save an additional 10% off the registration fee. To register visit our website at www.brinetwork.com or call us at 800-743-8490!

We look forward to seeing you in Las Vegas, NV!

Who should attend

From Home Care/Health Plans/Hospitals/Health Systems Retirement Communities/Medicaid & Medicare Organizations/Local Gov't Agencies/Employers

- Nurses
- Housing Directors
- Caregivers
- Palliative Care
- Hospice Care
- Post Acute Care
- Administrators
- CEO
- CFO
- Medicaid
- Medical Directors
- Operations
- Finance Dept.
- Social Workers
- Hospital at Home
- Disability Management
- Behavioral Health
- Transportation Services

Also of Interest to:
Vendors/Solutions Providers/Pharmaceuticals/Insurers

DAY ONE – MONDAY, SEPTEMBER 15, 2025

7:15am - 8:00am
Conference Registration & Networking Breakfast

8:00am - 8:10am
Chairperson's Opening Remarks

8:10am – 8:50am
Aging Well: Promoting Resilience, Connection, and Purpose in Later Life

As we age, maintaining a high quality of life involves more than just physical health—it also depends on our emotional, social, and mental well-being. In this informative and empowering session, Ms. Granigan will explore the multifaceted concept of "aging well," drawing from both clinical practice and current research.

Participants will gain practical strategies to support aging individuals—whether clients, loved ones, or themselves—by fostering resilience, encouraging social connection, managing mental health challenges, and navigating life transitions with purpose and dignity. The presentation will include case examples, evidence-based tools, and opportunities for discussion.

Kate Granigan, MSW, LICSW, C-ASWCM
Chief Executive Officer
LIFECARE ADVOCATES
Fellow of the Leadership Academy of the Aging Life Care Association
Aging Life Care Association Board of Directors, President 2024

8:50am – 9:30am
Building High-Performance Care Management Hubs: Where Clinical Excellence Meets Operational Efficiency

Community Care Hubs (CCH or hub) serve as a community-focused regional, statewide or multi-state umbrella organizations that coordinate, centralize and scale administrative functions and operational infrastructure on behalf of a network of community support providers that address social care needs and close care gaps through the contracts with health plans, health care providers, public health departments, Veterans Administration Medical Centers, and more.

Take a deep dive into how these pioneering organizations are centralizing care coordination to drive quality outcomes and operational efficiency and promote whole-person health. This session will explore how these hubs are becoming command centers that streamline communication between health and social care organizations, clients and families.

This session unpacks who these CCHs are, what kids of services they offer and how you can work with them effectively to better serve your clients.

Marisa Scala-Foley
Director, Aging and Disability Business Institute
USAGING

9:30am – 10:00am
Networking & Refreshments Break

10:00am – 10:40am
A Referee's Guide To Leadership

In the realm of leadership development, one can uncover invaluable insights from rather unconventional sources. We invite you to participate in an engaging presentation that delves into the leadership lessons that can be extracted from the role of a referee. David's enlightening presentation seamlessly weaves together real-world instances from the referee's playbook with actionable wisdom for achieving leadership success. By

drawing parallels between the art of refereeing and the realm of leadership in healthcare, this captivating session aims to furnish you with practical skills and strategies to enhance your effectiveness as a respected leader in any given scenario. Whether you are a seasoned leader with years of experience under your belt or just embarking on your leadership journey, this session promises to equip you with the necessary tools to lead with fairness, confidence, and utmost effectiveness.

Key Learning Objectives:

1. Decisiveness: Learn how to make confident decisions, especially in high-pressure situations, by studying the decision-making process of referees.
2. Conflict Resolution: Enhance your conflict resolution skills to maintain a harmonious team or organizational environment, just like referees do on the field.
3. Resilience: Develop resilience and composure during challenging times, inspiring confidence, and trust among your team members.
4. Impartiality: Discover how to be an impartial leader who treats all team members or stakeholders fairly and without bias.
5. Effective Communication: Master the art of communication, ensuring that your messages are clear, concise, and easily understood by your team.

David M. Posner, MBA
"Senior Care Ref"
3 POINT CARE CONSULTING

10:40am – 11:20am
Care Transitions & Complex Care Management: Building Revenue Through Clinical Excellence

The growing population of medically complex clients presents both challenges and opportunities for home care providers willing to elevate their clinical capabilities. Dive into how innovative organizations are developing specialized programs to support clients with multiple chronic conditions, post-acute care needs and complex medication regimens. Through real-world examples, we'll explore how providers are building care transition programs that reduce hospital readmissions while creating new revenue streams. Learn how leading organizations are training staff to manage higher-acuity clients, implementing clinical oversight programs and developing partnerships with primary care providers. See how companies are leveraging remote patient monitoring and telehealth to enhance their clinical capabilities. Walk away understanding how to position your organization as a valued partner in managing complex care needs while maintaining healthy margins and client satisfaction.

Jeffrey Klein, FACHE
President & CEO
NEVADA SENIOR SERVICES INC.

11:20am – 12:00am
Technology Integration & Interoperability: Breaking Down the Silos

In today's connected world, the ability to share data seamlessly across platforms is critical. Explore strategies for:

- Evaluating and selecting technology partners
- Integrating multiple systems and platforms
- Managing data security and privacy
- Leveraging APIs and integration tools
- Measuring ROI on technology investments

Chris Berno
Chief Technology Officer
AMERICAN SOCIETY ON AGING

12:00pm– 12:40pm
Creating Sustainable Revenue Streams Beyond Traditional Home Care

In our ecosystem today, forward thinking homecare providers need to differentiate and diversify revenue streams that are aligned with our core competencies and strengths. This session explores:

- Concierge and premium service models
- Care management /Aging Life Care and navigation services
- Partnerships with healthcare providers and other B2B opportunities
- How we solve problems and create perceived value for allied professionals

Steven Barlam, MSW, LCSW, CMC
Chief Executive Officer
JFS CARE
President
AGING LIFE CARE ASSOCIATION, 2025

12:40pm - 1:40pm
Networking Luncheon

1:40pm - 2:20pm
Building a Tech-Enabled Home Care Organization

This session will provide a comprehensive framework for leveraging technology to transform your home care operations. Through case studies and group exercises, participants will develop practical approaches to technology selection, implementation and optimization. We'll explore how to build the infrastructure, processes and culture needed to successfully integrate technology into care delivery.

Learning Objectives:

- Develop a technology roadmap aligned with organizational strategy
- Understand key considerations in vendor selection and implementation planning
- Master change management techniques for driving technology adoption
- Create frameworks for measuring ROI and outcomes
- Build competencies for managing technology-enabled operations

Eric Marshall
CEO, Founder & Clinical Therapist
WARRIOR'S LEGACY CARE

2:20pm - 3:20pm
Panel: Building Sustainable Business Models: Revenue Diversification and Strategic Partnerships

As the home care industry evolves rapidly, providers can no longer rely solely on traditional service models to remain competitive and profitable. Panelists will share strategies for developing concierge and premium service offerings, implementing care management services and creating value-added partnerships with healthcare systems and payers.

The discussion will cover how to identify new market opportunities, position your organization as an essential healthcare partner, and build business models that align with emerging payment structures and value-based care arrangements.

Panelists:

Kate Granigan, MSW, LICSW, C-ASWCM
Chief Executive Officer
LIFECARE ADVOCATES
Fellow of the Leadership Academy of the Aging Life Care Association
Aging Life Care Association Board of Directors, President 2024

Jeffrey Klein, FACHE
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Lynne Cote
Branch Manager
SENIOR HELPERS OF GREEN VALLEY

Jennifer T. Szakaly, MA, CMC, NMG
Founder & CEO
National Certified Care Manager & National Master Guardian
Caregiving Corner
AGING LIFE CARE ASSOCIATION® BOARD OF DIRECTORS

3:20pm – 3:50pm
Networking & Refreshments Break

3:50pm – 4:30pm
The Home-Centered Care Continuum: Advancing Aging in Place with Medical Innovation

As the U.S. population ages and healthcare systems face mounting pressure to deliver high-quality, cost-effective care, the home is emerging as a critical site of care delivery. This presentation explores the evolving landscape of home-based medical care (HBMC) and its pivotal role in enabling aging in place—a model that aligns with patient preferences, improves outcomes, and reduces avoidable institutionalization.

Drawing on real-world experience in hospital-at-home, hospice, and advanced illness care, this session presents a comprehensive care continuum that spans from preventive and primary care to acute, palliative, and end-of-life services—all delivered in the home. We will examine the clinical, operational, and policy frameworks that support this model, including interdisciplinary team structures, technology integration, and value-based payment strategies.

Attendees will gain insights into:

- The core components of a scalable home-based care model
- How to align incentives across payers, providers, and caregivers
- The role of Medicare Advantage and advance payment models in accelerating adoption

Ultimately, this session will challenge traditional assumptions about where care should happen and offer a vision for a home-centered healthcare ecosystem that supports dignity, independence, and quality of life for older adults.

Jatin Dave, MBBS, MPH, FACP
Chief Medical Officer, Government Products
UPMC HEALTH PLAN

4:30pm - 5:10pm
Scaling Operations While Maintaining Quality

Growth brings operational challenges that can impact quality if not managed properly. Learn how successful organizations are scaling while maintaining consistent service delivery. Discover frameworks for standardizing processes, measuring outcomes and maintaining oversight of a distributed workforce. Walk away with practical tools for managing growth without sacrificing quality.

Marybeth McMahon, BS, CPHQ, LSSGB
Director of Operations, Hospital Care at Home
CHRISTIANACARE CENTER FOR VIRTUAL HEALTH

5:10pm
End of Day One

DAY TWO – TUESDAY, SEPTEMBER 16, 2025

7:15am - 8:00am
Networking Breakfast

8:00am - 8:15am
Chairperson's Remarks

8:10am - 8:50am
The Rise of Hospital-at-Home Programs: New Opportunities for Home Care

The explosive growth of hospital-at-home initiatives is creating exciting opportunities for home care providers. Take a deep dive into how these programs work and the role home care can play. Understand the operational requirements, technology needs and staffing models required to participate. Learn from organizations that have successfully partnered with hospital-at-home programs and capture insights on how to position your company to take advantage of this trend.

Stephen C. Dorner, MD, MPH, MSc
Chief Clinical and Innovation Officer
MASS GENERAL BRIGHAM HEALTHCARE AT HOME

8:50am - 9:30am
How Hospital at Home Programs can Decrease Skilled Nursing Facility Utilization

Hospital at Home offers a new pathway for decreased skilled nursing facility utilization, directly at the patient level and indirectly at the system level. A substantial proportion of patients who otherwise meet clinical criteria for Hospital at Home are evaluated by physical and occupational therapy and resultingly, fall under rehab recommendations that represent a borderline case between discharge to skilled nursing and discharge to Home Health PT/OT services. It is the belief of our Hospital at Home team that many of these patients, who would have normally been discharged to skilled nursing facilities, can be safely transferred to Hospital at Home, where they are able to ambulate more freely than in a traditional hospital setting. For the patient, this process will result in higher satisfaction, increased time at home with family members and caretakers, and less opportunity for medication errors. At the system level, there is an opportunity for decreased excess bed days, decreased emergency department holds, and increased leverage with payors.

Alexander R. Levit, MD
Medical Director – Hospital at Home
LPG Hospitalists
LEE HEALTH SYSTEM, INC.

9:30am - 10:00am
Networking & Refreshments Break

10:00am - 10:40am
Building Solid Partnerships with Aging Life Care Managers®

In an increasingly competitive home care, landscape, leveraging key referral partnerships is not only necessary for continued growth in your business, but it also provides an opportunity to differentiate yourself from competition. Led by a speaker with both home care and care management experience, session attendees will learn how to best approach and maintain a relationship with Aging Life Care Managers in their market. We will also look at the division of responsibilities in shared cases, case studies on successful partnerships, and co-marketing opportunities.

Jennifer T. Szakaly, MA, CMC, NMG
Founder & CEO
National Certified Care Manager & National Master Guardian
CAREGIVING CORNER
Aging Life Care Association® Board of Directors

10:40am - 11:20am
Risk Management & Compliance in the Digital Age

The regulatory landscape continues to evolve, especially around technology use and data privacy. Get up to speed on emerging compliance requirements and risk management best practices. Learn strategies for protecting your organization while leveraging new technologies. Understand documentation requirements, audit preparation and incident response planning in today's environment.

Home Health Agencies are at an increased risk of privacy breaches given the very nature of the visits. Home Health nurses and therapists primarily work from their cars and inside the patients' homes. They are not afforded the privacy of an office, a COW in a hospital setting, or a desktop computer in an office-based practice. Led by the Director of Nursing with a background in risk management and counsel for medical malpractice defense litigation, session guests will receive updates in regulatory compliance (HIPAA, Patient Data Security, EMR vs. paper documents) and how to remain compliant. The speaker will also discuss risk management strategies when there is an alleged breach, patient complaint, or readmission to the hospital.

Tricia E. McVicker, JD, RN, BSN
Director of Nursing/In-House Counsel
HEROES HOME HEALTH

11:20am – 12:00pm
Supporting Complete Care at Home for Frail Older Adults; An Overview of the PACE Model of Care and Is Success in Supporting Care in the Community

The Program of All Inclusive Care for the Elderly (PACE) is the only fully integrated care models for frail older adults in need of a nursing home level of care. As a provider of care, PACE organizations integrate, provide and coordinate all Medicare, Medicaid and medically necessary services through a comprehensive interdisciplinary team comprised of physicians, nurses, social workers, PT/OT, transportation, home care and other service components of care. This session will explain and describe PACE, what makes the model work and highlight its exception outcomes of care that lead to high rates of satisfaction among those served by PACE.

Shawn Bloom
President and CEO
NATIONAL PACE ASSOCIATION

12:00 – 12:40
Strengthening Home Care through Direct Care Workforce Integration: Strategies for Hospitals and Health Systems

As the backbone of home- and community-based services, direct care workers (DCWs) play a critical role in improving outcomes for individuals aging in place—yet remain underutilized within broader healthcare delivery systems. This session from the DCW Strategies Center examines innovative strategies for elevating and integrating DCWs within health systems and will explore how healthcare institutions can better align care management functions enhance quality, reduce avoidable hospitalizations, and support person-centered care through targeted investment in the direct care workforce. The session highlights emerging state and national models, addresses workforce stabilization, and offers actionable insights for healthcare leaders seeking to improve patient care through strategic partnerships with their Medicaid home and community based services network of care.

Nicole Howell
Director, Direct Care Workforce Development
NATIONAL COUNCIL ON AGING, INC.

12:30pm
Conference Concludes

Register by **August 3rd, 2025** & Save an Additional **$100 off the Early Bird** – Mention Promo Code **BR100**!

WORKSHOP

Tuesday, September 16, 2025 • 12:45pm – 2:45pm

Innovation and Marketing of Financial Services for Aging in Place

Join us for an interactive workshop exploring how financial services can support older adults who are aging in place. We'll dive into how to uncover their needs, design and refine relevant financial solutions, and communicate offerings in ways that build trust and drive adoption. Through real-world case studies and hands-on design thinking exercises, you'll leave with tools you can apply in your business to spark innovation and improve engagement with this growing consumer segment. From this, you will learn how to:

- Identify who your target customers are
- Learn from your target customers, identifying their unmet needs and solutions they're using today
- Align your core competency with these needs to offer improved solutions
- Communicate your new offer (language to use; where to get the word out)

Dana Keilman
CEO & Co-Founder
MORNING LIGHT STRATEGY

Tara Ballman
Aging-in-Place Business Development Director
LONGBRIDGE FINANCIAL

For Sponsorship & Exhibit Opportunities please call us at **800-743-8490** or email us at **spex@brinetwork.com.**
For Group Discounts of three or more please call us at **800-743-8490** or email us at **info@brinetwork.com**

This Event will be Co-Located with:

VENUE

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866-227-5938

**Mention BRI Network to get the discounted rate of $219/night*

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2025 AGING IN PLACE EXCELLENCE SUMMIT

September 15-16, 2025 • Caesars Palace • Las Vegas, NV

Registration

☐ **Conference** ☐ **Conference & Workshop**

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HOSPITAL/HEALTH SYSTEMS/HEALTH PLANS/HOMECARE/RETIREMENT COMMUNITIES/HOSPICE/PALLIATIVE/ MEDICAID & MEDICARE AND GOV'T AGENCIES			
Register by	**8/1/25**	**8/15/25**	**9/15/25**
Conference Only	$1195	$1295	$1495
Conference + Workshop	$1395	$1495	$1695

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Register by	**8/1/25**	**8/15/25**	**9/15/25**
Conference Only	$1595	$1695	$1895
Conference + Workshop	$1795	$1995	$2095

** All Payments must be received four weeks prior to the event. If you need to cancel four weeks prior to the event there will be a full refund minus a $225 administrative fee. If you need to register a substitute please contact us or email us at support@brinetwork.com. All cancellations received under four weeks will be provided a pass to a future event for either yourself or a colleague which will be valid for two years from the date of conference.