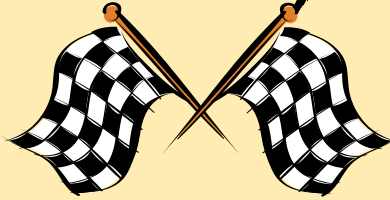




Conference Information



Supercharge YOUR Aging Programs Surviving and Thriving!

February 28, 2014 | 8:30 AM — 4:00 PM

PIEDMONT TRIAD REGIONAL COUNCIL

1398 CARROLLTON CROSSING DRIVE | KERNERSVILLE, NC 27284

OFFICE: 336.904.0300 | FAX: 336.904.0302

*“Clearly we are at a crossroads.
Throughout our history one thing holds true:
in times of great challenge
we have experienced great innovation.”*
— Bob Reynolds

Hosted By



Piedmont Triad Regional Council
Area Agency on Aging



About The Conference

The Piedmont Triad Regional Council Area Agency on Aging invites you and your colleagues to a daylong conference focusing on changes in the aging network and the support of a *business model* for local nonprofits and public partners. This includes diversifying resources, marketing, fundraising, strategic partnerships, and pricing of services.

Guest speakers and panelists have been selected based on their reputation and passion for creativity and pioneering initiatives.

When you leave this conference, we want you to be energized and better equipped to tackle the array of challenges you face.

We have lined up NINE outstanding leaders from the national, state, and local levels to share with you their best practices, proven methods, and new ideas.

Submit your registration soon — space is limited! The cost of \$50 per person includes refreshments, lunch, and training materials.

Direct questions to Allison Brown, Program Planner for Aging, 336.904.0300 or abrown@ptrc.org.

Who Should Attend?

Anyone interested in understanding how the non-profit agencies that provide critical services for seniors will survive in the face of reduced funding and escalating demand for services should attend this conference.

Executive directors and staff in management positions with agencies providing human

services, engaged volunteer residents, those who develop strategic plans, county commissioners, county managers, economic development officers, and fiscal policy makers should attend this conference.

Spread the word — space is limited.

Nine Great Reasons to Join Us

The best place to seek advice is from the person who is considered “the expert” in their field. For this conference, we have invited NINE leaders at the national, state, and local levels, who are proven “experts,” to share with you their experiences from the trenches and vision for the future.

The next three pages present biographical information for each of our guests. We think you will be impressed with their credentials, but more importantly, you will be motivated to come hear them first hand.

See you February 28th.

Supercharge YOUR Aging Programs

Agenda

8:30 AM **Registration**

9:00 AM **Welcome & Opening Comments**

Matthew Dolge, Executive Director, Piedmont Triad Regional Council
Blair Barton Percival, Director, Area Agency on Aging

9:20 AM **Life in the Fast Lane**

Ice Breaker

9:40 AM **Break & Transition**

9:55 AM **Drivers, Start Your Engines**

Dennis Streets, Director, N.C. Division of Aging and Adult Services

The view from Raleigh is different from the view at the ground level of home and community-based services. Dennis Streets will bring insights from the Capitol about how policy-makers are preparing for changes in funding and service delivery within the Aging Network.

10:50 AM **Into the First Turn**

Sandy Markwood, CEO, National Area Agencies on Aging

Looking ahead, there will be more, not fewer, older Americans, with escalating issues that are a natural part of aging. The supports they need to age in place will not change noticeably over the next twenty years. The agencies bringing the services are committed providers in our communities. However, the ways in which local governments, provider agencies, community businesses, policy-makers, volunteers, and older adults inter-relate will change. How can you proactively "write a new script" that will promote ongoing delivery of vital services to enable our seniors to age in place as long as possible and as cost-effectively as possible?

11:45 AM **Lunch / Activity / Break**

Agenda subject to change.



Supercharge YOUR Aging Programs

Agenda

(continued)

12:30 PM Panel Discussion #1: Marketing and Making “The Ask”

- *Thessia Everhart-Roberts, Director, Davidson County Department of Senior Services*
- *Richard Gottlieb, President and CEO, Senior Services, Inc.*
- *Candie Rudzinski, Executive Director, Randolph County Senior Adults Assn., Inc.*

These panelists bring more than 80 years of experience in the Aging Network, managing service delivery during many economic cycles and varying policy climates. They are known for their ability to raise awareness, establish their “brands,” and make “the ask” to add funding for their programs. They will share their best practices, recap their most successful campaigns, and identify pitfalls to avoid. Learn how to increase awareness about the importance of your agency's work, how to make the most of marketing opportunities, and how to supplement your revenues with successful fund-raising activities.

1:45 PM Panel Discussion #2: Strategic Partnerships & New Revenue Streams

- *Lee Covington, Executive Director, Aging, Disability, and Transit Services (ADTS)*
- *Chip Cromartie, Executive Director, Adult Center for Enrichment*
- *Steve Fleming, President and CEO, Well•Spring Services, Inc.*

What do we mean when we talk about “business models” in the context of our traditional non-profit operating environment? These panelists are pioneering successful new ways to apply principles from the for-profit business world that are not only increasing revenue potential, but streamlining service delivery as well. Let them tell you about what has worked (and what has not worked) in their innovative approaches. Be better prepared to face the changing landscape of the Aging Network, in the face of shrinking public funding and increasing population demands.

3:00 PM Racing to Victory Lane

- *Mitchell Silver, Director, Department of City Planning, Raleigh, NC*

Known for his compelling style and sense of humor, Silver is highly-sought as a speaker. As Planning Director in Raleigh, he has led the comprehensive plan update process to create a vibrant 21st century city. Since coming to Raleigh in 2005, Mitchell has been an outspoken advocate to transform Raleigh into a world class city with a modern transit system and great streets, great places and great neighborhoods. Let him stretch your thinking and show you new perspectives that will inspire you. In the face of discouraging circumstances, come find energizing ideas to share with your teams and renew your commitment to make a difference in the lives of as many elderly as possible.

4:00 PM Closing

Nine Reasons to Attend:

REASON #1

Three Guest Speakers

Sandy Markwood, CEO, National Association of Area Agencies on Aging (n4a), Washington, DC

Prior to joining n4a, Markwood worked for 20 years at the National Association of Counties, the National League of Cities and as the Assistant to the County Executive in Albemarle County, VA. In these positions, she provided policy and programmatic support to counties and cities throughout the nation on aging, health, housing, community development, land use, transportation, environmental quality, and workforce development issues.

As CEO, Ms. Markwood is responsible for working with the Board and staff to set n4a's overall strategic direction, oversees the implementation of all policy, grassroots advocacy, membership and program initiatives. Externally, Ms. Markwood forms strategic partnerships with federal agencies and organizations in aging, human service and health care arenas to enhance the role and recognition of Area Agencies on Aging and Title VI programs.

The n4a is the organization which represents the nation's 629 Area Agencies on Aging and serves as a champion for the more than 246 Title VI Native American aging programs. n4a is dedicated to build the capacity of its members to: **advocate** on behalf of older adults and their caregivers; take **action** to ensure that communities are equipped to support and enhance the well-being of older adults, persons with disabilities and their caregivers; and serve as the focal point in the community for **answers on aging**.

REASON #2

Mitchell Silver, Chief Planning & Development Officer and Planning Director, City of Raleigh, NC

As Chief, Mitchell oversees a business enterprise that includes 230 employees, three departments (City Planning, Community Development, and Inspections) and four offices (Transportation Planning, Economic Development, Development Services, and the Urban Design Center). Mitchell serves on the City's Executive Leadership team with the City Manager, Assistant City Managers, CFO and CIO. Mitchell is past president (2011-2013) of the American Planning Association (APA).

Mitchell is an award-winning planner with over 25 years of experience. He is nationally recognized for his leadership in the planning profession and his contributions to contemporary planning issues. He specializes in comprehensive planning, land use planning and implementation strategies. Before coming to Raleigh in 2005, Mitchell had worked as Policy and Planning Director in New York City, a Principal of a New York City-based planning firm, a Town Manager in New Jersey and Deputy Planning Director in Washington, DC.

As Planning Director in Raleigh, he has led the comprehensive plan update process to create a vibrant 21st century city. He is now overseeing a rewrite of the City's Development Code. Since coming to Raleigh in 2005, Mitchell has been an outspoken advocate to transform Raleigh into a world class city with a modern transit system and great streets, great places and great neighborhoods.

REASON #3

Dennis Streets, Director, North Carolina Division of Aging and Adult Services (DAAS), Raleigh, NC

Dennis was appointed Director of DAAS by the Secretary of Health and Human Services in February 2006, after serving as the chief of the DAAS Budget, Planning, and Systems Support Section. He has worked at the Division since 1996.

Streets has devoted his career to the field of aging and adult services. His prior work experience includes government service with the Division of Social Services and the Triangle J Area Agency on Aging; serving in the private sector as the executive director of The Evergreens, Inc, a non-profit long-term care organization, and as a professional relations representative with Blue Cross and Blue Shield of North Carolina; and serving as coordinator of the Center for Aging Research and Educational Services at the UNC-Chapel Hill School of Social Work. He was co-editor of the book *The Field of Adult Services*, published in 1995. He has received many honors, including the 2012 Presidential Award of the NC Association on Aging, the 2008 Jim Long Outstanding SHIIP Service Award from the North Carolina Department of Insurance, the 2007 Jane Kennedy Excellence in Aging Award of the Southeastern Association of Area Agencies on Aging, and the 2000 Executive Leader of the Year Award of the NC Association on Aging.

Nine Reasons to Attend: Three Panelists for Marketing

REASON #4

Panel #1: Marketing & Making "The Ask"

Thessia Everhart-Roberts, Director, Davidson County Department of Senior Services, Lexington, NC

Currently serving as the Director of the Davidson County Department of Senior Services, she has been employed there for twenty-one years. She has completed the *Municipal and County Administration* course work and *Leading For Results* as a Local Government Federal Credit Union Fellow at UNC- Chapel Hill.

Through advocacy and resources, Thessia puts her knowledge, skills, and abilities into helping the elderly age in their home and remain independent for as long as possible, prolonging possible nursing home placement. Senior Services, under Thessia's leadership has expanded its programs and services, developed a five year Strategic Plan, coordinated leaders across Davidson County, and began implementing a successful corporate donor initiative.

Richard Gottlieb, President and CEO, Senior Services, Inc., Winston-Salem, NC

Since 1981, Richard Gottlieb has served as CEO of Senior Services, Inc., a private nonprofit agency serving older adults in Winston-Salem and Forsyth County. Under Richard's leadership, Senior Services has grown from a staff of 12, a volunteer force of 300 and a budget of \$190,000 to a staff of more than 100, more than 2,000 volunteers, and an annual budget of \$5.8 million. Over the last 10 years, on average, 91% of expenses have gone to direct services for older adults.

Richard has served on a variety of community boards and is a past president of the Rotary Club of Winston-Salem and past chairman of the board of the North Carolina Center for Nonprofits.

In 1987, 1999 and 2007, Senior Services was the winner of the Joel A. Weston, Jr., Award for Excellence in Nonprofit Management, and in 2010 the Williams Center of Senior Services was recognized as the BEST DAY CENTER in the country, by the National Adult Day Services Association.

REASON #5

Candie Rudzinski, Executive Director, Randolph County Senior Adults Assn., Inc., Asheboro, NC

Candie has nearly 30 years of professional experience in the field of aging. She has served as the Executive Director at RCSAA for 21 years and prior to that, was the Director of the Home Care Program offered at Regional Consolidated Services for 5 years. She also worked as a Health Planner with the Piedmont Health Systems Agency in Greensboro, NC.

Candie is the recipient of many awards that recognize her exceptional leadership, including the "Outstanding Mentor of Emerging Professionals in Aging" from UNC-G; Randolph County's "Favorite Non-Profit Executive" Reader's Choice Award; the Randolph County "Athena Award" for most outstanding professional woman; "Executive of the Year - Excellence Award" from the NCAOA; and induction into the "Randolph County Woman's Hall of Fame."

She re-engineered a countywide transportation program comprised of 2 working vehicles and 4 part-time drivers and transformed it into a service with 25 vans and 37 employees. Most recently, she has spearheaded the capital campaign for funding a new facility due to be completed in the spring of 2014.



Nine Reasons to Attend: Three Panelists for Business Models

Panel #2: Strategic Partnerships & New Revenue Streams

REASON #7

Lee Covington, Executive Director,

Aging, Disability, and Transit Services (ADTS), Rockingham County, NC

Lee has served as Executive Director for ADTS since 2009 and has more than 23 years in various nonprofit leadership positions. He also currently serves as President of the NC Association on Aging and as President of the NC Meals on Wheels Association. In 2013, Lee launched a new product line, *@Home Assisted Living*, featuring tiered pricing of different levels of bundled services for private pay clients.

REASON #8

Chip Cromartie, Executive Director, Adult Center for Enrichment, Greensboro, NC

Chip has worked in the aging services industry for more than 14 years. Chip serves as the Chair of the National Adult Day Services Association and the past Chair of the North Carolina Adult Day Services Association's Board of Directors. In addition, Chip is the Co-Founder and Board Member of the Adult Day Services Resource Center of North Carolina. He has served on a number of other Boards and Committees associated with aging.

REASON #9

Steve Fleming, President and CEO, Well•Spring Services, Inc., Greensboro, NC

Steve sits on the Boards of PACE of the Triad, Pace of the Southern Piedmont, and LeadingAge and has served as Chair of the N.C. State Board of Examiners for Nursing Home Administrators and the Health Care Management Advisory Board of ASU.

Well•Spring Services, Inc. is a multi-modal aging services provider serving more than seven hundred individuals and their families. Services provided by Well•Spring include an accredited, award-winning Continuing Care Retirement Community, Adult Day programs, Caregiver educational services, Home Care, and PACE (Program for All-Inclusive Care for the Elderly).



Directions & Accommodations

Directions

Physical Address: 1398 Carrollton Crossing Drive, Kernersville, NC 27284

Search Engine Address: 1393 Carrollton Crossing Drive, Kernersville, NC 27284

Please use the **Search Engine Address** with your GPS systems to locate the PTRC AAA.

From East of Kernersville

Take Interstate-40 to Exit 203. Turn left at the ramp onto Highway 66 South. Drive 3/4 mile. The Piedmont Triad Regional Council building is on your right — turn right onto Crews Farm Road, then an immediate left onto Carrollton Crossing Drive, pass the building on the right, then turn right into the parking lot.

From West of Kernersville

Take Interstate-40 to Exit 203. Turn right at the ramp onto Highway 66 South. Drive 3/4 mile. The Piedmont Triad Regional Council building is on your right — turn right onto Crews Farm Road, then an immediate left onto Carrollton Crossing Drive, pass the building on the right, then turn right into the parking lot..

From North or South of Kernersville

All major inbound highways intersect with Interstate-40. Make your way to Interstate-40 and follow one of the directions above.

Hotels

Holiday Inn Express

1570 Hwy 66, Kernersville, North Carolina 27284
(336) 564-3333

Reference "PTRC" for a rate of \$75 per night for a regular room (non-king)

Other Hotels

Sleep Inn at Exit 203

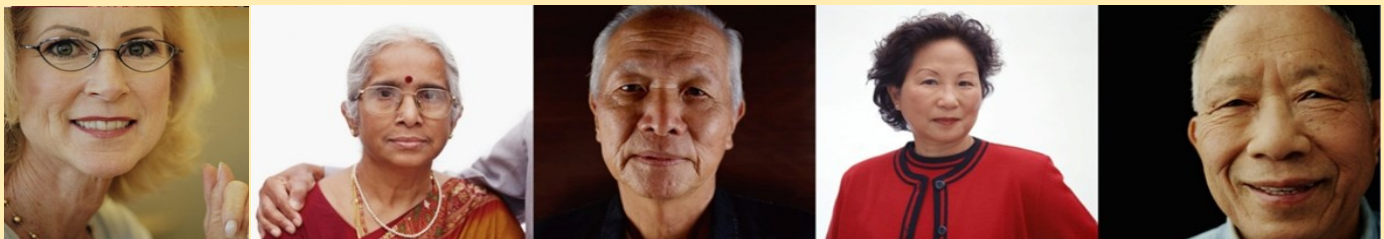
Quality Inn on Highway 66 (2.3 miles)

Kings Inn on E. Mountain Street (3 miles)

Additional hotels are located at the PTI Airport in Greensboro

Piedmont Triad International (PTI) Airport (GSO)

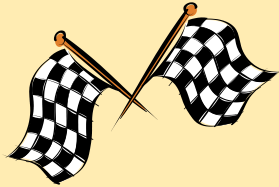
1000 A Ted Johnson Parkway, Greensboro, NC 27409
13 miles from PTRC AAA offices





Registration

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Surviving and Thriving!**



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OFFICE: 336.904.0300 | FAX: 336.904.0302

Name _____ Title _____

Agency / Affiliation _____

Email Address _____

Address _____

Phone # _____

Cost to Attend: \$50.00

Please make checks payable to
"Piedmont Triad Regional Council"
Reference "AAA Supercharge Conference"
Fee includes refreshments, lunch,
and training materials.

Indicate your preference for
a vegetarian meal by checking here:

Direct questions to Allison Brown
Program Planner for Aging
336.904.0300 or abrown@ptrc.org

*Submit completed registration
and payment by
February 14, 2014 to:*

Susan Jones
AAA Supercharge Conference
Piedmont Triad Regional Council
1398 Carrollton Crossing Drive
Kernersville, NC 27284

**Space is limited.
Early registration is encouraged.**