The UMA Annual Meeting is the best place for professionals in diverse ministries to learn, find inspiration for the work they do, and hear from leaders in the field. Senior leadership, trustees, community outreach ministries, faith providers, and business partners – those committed to quality service to diverse populations including seniors, children, youth, families, and persons with emotional or developmental disabilities.

3 Reasons You Must Attend

1. **SPEAKERS.** Hear from influential leaders that are making an impact around the country.
2. **COMMUNITY.** Make connections with others in your industry network and beyond.
3. **SESSIONS AND EVENTS.** Choose from unique learning activities and events where you can invest in yourself and spark ideas to incorporate into your work.

### HOLISTIC CARE AND COMMUNITY
1-A. Creating Community: The Evolution of Social Neighborhoods
2-B. Using CQI to Increase Capacity to Meet Spiritual Needs
3-C. Families First: Keeping Focus in the New Normal
4-D. The Effects of Caring
19-D. Telling Their Story: Dignity Through Technology
5-E. Attachment and Connection Across the Lifespan
6-F. Ready Your Residential Care for Family First
16-G. Preparing for a New Way Forward

### BOARD GOVERNANCE
11-A. Reach for Exceptional Governance for a Sustainable Future
12-B. Strategic Reposition for the Future of Senior Living
8-C. Getting It Right: Finding Your Next Pivotal Leader
18-C. Developing and Operating Communities to Serve Middle Income Seniors
14-E. Compliance Duties and Oversight of Governing Boards
15-F. Managing Your Risk: Trends and Preventions in Long-Term Care
16-G. Preparing for a New Way Forward
22-H. Philanthropy Spring Summit

### HUMAN RESOURCES
7-B. Back to the Future: A Tactical Approach to Preserving Heritage and Building Culture
8-C. Getting it Right: Finding Your Next Pivotal Leader
4-D. The Effects of Caring
9-D. Learning into Failure: Developing an Authentic Learning Organization
15-F. Managing Your Risk: Trends and Preventions in Long-Term Care
10-G. Culture Eats Strategy for Lunch and Here’s Why!

### MARKETING
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17-A. Marketing Essentials and Dilemmas for Faith-Based Organizations
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19-D. Telling Their Story: Dignity Through Technology

### TECHNOLOGY
12-B. Strategic Reposition for the Future of Senior Living
13-D. A Proactive Approach to Cyber Threats in Healthcare
19-D. Telling Their Story: Dignity Through Technology
15-F. Managing Your Risk: Trends and Preventions in Long-Term Care

### HOUSING
1-A. Creating Community: The Evolution of Social Neighborhoods
18-C. Developing and Operating Communities to Serve Middle Income Seniors
20-E. Discovering a Diverse Perspective
22-H. Philanthropy Spring Summit

### PHILANTHROPY
17-A. Marketing Essentials and Dilemmas for Faith-Based Organizations
19-D. Telling Their Story: Dignity Through Technology
21-F. Creating a Culture of Philanthropy
16-G. Preparing for a New Way Forward
22-H. Philanthropy Spring Summit

### FINANCIAL MANAGEMENT
11-A. Reach for Exceptional Governance for a Sustainable Future
12-B. Strategic Reposition for the Future of Senior Living
18-C. Developing and Operating Communities to Serve Middle Income Seniors
15-F. Managing Your Risk: Trends and Preventions in Long-Term Care

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**BRING YOUR TEAM!**

**WE’VE GOT SOMETHING FOR EVERYONE ON YOUR LEADERSHIP TEAM.**
Dear Friends,

On behalf of UMA, we are thrilled to invite you to our 2020 Annual Meeting, April 28-30 in Boulder, CO. We are fortunate that Frasier will host our meeting on their stunningly beautiful campus, graced with gorgeous views of the Rocky Mountains.

Our three-day conference has so much to offer your leadership team including quality education, inspiring general sessions and numerous networking experiences. The meeting features author and entertainer Curtis Zimmerman whose keynote talk will inspire you to test your talents to be your best. New this year, we’ve added a Philanthropy Spring Summit, so extend your stay as long as possible and network with your peers.

This year’s meeting theme is “REACH.” Throughout this year, we will be exploring the many ways you can reach out to one another to partner, grow your impact and stretch yourself and your mindset. You get the idea?!

We also are fortunate to have more than a dozen business partners supporting our members’ work and sharing their expertise as speakers, sponsors and attendees. We invite everyone to gather with us on Wednesday evening at our Celebration of Excellence to recognize our newly reaccredited organizations and UMA Award winners.

The City of Boulder sits 5,430 feet above sea level, and reportedly enjoys 300 plus days of sunshine, so we anticipate a sunny meeting. Join us for education and camaraderie. Plan to be a part of the UMA Annual Meeting this spring. We look forward to seeing you!

All the best,

Mary Kemper, CEO, UMA
Rob McMonagle and Susan Sharp, Co-Chairs
Shared Learning Committee
**WESLEY LEVEL SPONSOR**

John Wesley was the co-founder of Methodism. He was known for his tireless efforts and unselfish service to the poor and vulnerable people.

---

**ALDERSGATE LEVEL SPONSOR**

In 1738, John Wesley attended an evening prayer meeting on Aldersgate Street in London, where he experienced assurance of his salvation.

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**SOJOURNER TRUTH LEVEL SPONSORS**

Sojourner Truth, an ex-slave, became a Methodist preacher who crusaded for abolition and women’s rights activist and the overall betterment of society.

---

**EXCEL MEMBERS**

Excel members help accelerate the mission and goals of UMA and EAGLE with contributions of 15% or more above their basic dues.
**SCHEDULE OF EVENTS**

**BOARD OF DIRECTORS**

Debbie Reed, Chair  
President and CEO  
Chaddock  
Quincy, IL

- **Kevin Anderson**  
  President and CEO  
  Wesley Homes  
  Des Moines, WA

- **Larry Carlson**  
  President and CEO  
  United Methodist Communities  
  Neptune, NJ

**Board of Directors**

- **Greg Peters**, Past Chair  
  Chief Executive Officer  
  UMFS  
  Richmond, VA

- **Steve Fetyko**, Vice Chair  
  President and CEO  
  United Methodist Retirement Communities and Porter Hills  
  Chelsea, MI

- **Alison Evans**, Secretary  
  President and CEO  
  The Methodist Home for Children and Youth  
  Macon, GA

- **Jason Miller**  
  Senior Vice President  
  Otterbein SeniorLife  
  Lebanon, OH

- **Brian Piccini**  
  President and CEO  
  United Methodist Homes  
  Binghamton, NY

- **Marlin Livingston**, Chair  
  President and CEO  
  Cunningham Children’s Home  
  Urbana, IL

**EAGLE COMMISSION**

- **Deborah Armstrong**  
  Vice President of Quality Improvement  
  The Baby Fold  
  Normal, IL

- **John Bellini**  
  Chief Development and Strategy Officer  
  Hilcrest Family Services  
  Dubuque, IA

**MONDAY • APRIL 27**

- 7:00 AM: Breakfast on Your Own at Hotels  
  Shuttles to Fraser

**TUESDAY • APRIL 28**

- 7:00 AM: Breakfast on Your Own at Hotels  
  Shuttles to Fraser

- 9:00 AM: UMA Board of Directors Meeting
- 9:00 AM: 10:00 AM General Session featuring Curtis Zimmerman
- 10:45 AM–1:15 PM Concurrent Education Sessions (C) x 3
- 1:30–2:30 PM Concurrent Education Sessions (D) x 4
- 3:00–4:30 PM Concurrent Education Sessions (B) x 3

**WEDNESDAY • APRIL 29**

- 7:00 AM: Breakfast on Your Own at Hotels  
  Shuttles to Fraser

- 8:30–10:00 AM Concurrent Education Sessions (F) x 3
- 10:15–11:45 AM Concurrent Education Sessions (G) x 2

**THURSDAY • APRIL 30**

- 7:00 AM: Breakfast on Your Own at Hotels  
  Shuttles to Fraser

- 8:30–10:00 AM Concurrent Education Sessions (A) x 3
- 10:15–11:45 AM Concurrent Education Sessions (A) x 3
- 1:00–2:30 PM Concurrent Education Sessions (A) x 3
- 4:30–6:00 PM Meet and Greet Reception

**MONDAY • APRIL 27**

- 9:00 AM: New CEO and Board of Directors Lunch (Invitation Only)

**Tuesday • April 28**

- 12:00–1:00 PM Concurrent Education Sessions (A) x 3

**Wednesday • April 29**

- 1:00–2:30 PM Concurrent Education Sessions (A) x 3

**Thursday • April 30**

- 1:30–2:30 PM Concurrent Education Sessions (A) x 3

All events are held at Frasier unless otherwise noted.
Shared Learning Committee

Opening General Session

Wednesday, April 29 • 8:30 – 10:30 AM

Life at Performance Level

Featuring Curtis Zimmerman

To thrive in today’s dynamic health and human service arena, leaders must strive to reach their peak potential. We must stretch our vision and abilities to manage change, engage clients and create a great culture. As individuals and organizations, the way to truly achieve success is to continue to grow, learn and implement new ideas. That’s no easy feat. To do so, we must act with intention, dream big and script new goals and challenges to create the life we want.

Curtis Zimmerman is among the nation’s premier speakers and entertainers. As an award-winning mime, juggler, and fire-eater, Curtis sensitively balances the connection between education and entertainment while weaving together a highly interactive and life-changing message. A frequent consultant for corporations and educators, Curtis is the author of several books including I Believe...What do you Believe?, Keys to Success in College and Life, and Life at Performance Level.

Get ready for his profound insights in this inspiring, high energy presentation.

It’s showtime!
Realize that Everyone and Anyone Can become Homeless

UMA has a proud history of providing housing and care to our country’s most poor and vulnerable. As early pioneers, our predecessors founded the oldest orphanage in America in 1741 in the early colony of Georgia and established the first home for aged persons in New York City in 1850. Sadly, homelessness continues to afflict our communities.

On any given day, more than half a million people in the United States are homeless. From families living in tent cities in major metropolitan areas to people sleeping on couches in rural towns or in their cars in suburban neighborhoods, homelessness is a growing national crisis.

While anyone can become homeless, the populations we serve remain among those at greatest risk. Statistics bear out that nearly one-quarter of them are people with disabilities. The number of elders on the streets increased nearly 50 percent over the past decade.

For youth aging out of foster care, 40-50 percent become homeless within 18 months. How can we work together to make an impact?

Dialogue with our panel of experts about the causes for this national crisis and discover innovative solutions that are beginning to make a difference.
Below is an overview of our education program and related EAGLE principles.

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**HOLISTIC CARE AND COMMUNITY**

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**GOVERNANCE, LEADERSHIP AND STEWARDSHIP**

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* = CHILDREN, YOUTH AND FAMILY FOCUSED  * = OLDER ADULT MINISTRIES FOCUSED
30-P. EAGLE Peer Reviewer Training
Tuesday, April 28, 9:00 AM – Noon • Frasier

This half-day event is relevant to new peer reviewers or experienced reviewers seeking a refresher. Leaders, emerging leaders and professionals identified in your organization to monitor quality systems are encouraged to attend. Serving as a peer reviewer contributes to the quality of health and human services while also offering valuable professional development.

- Join other peer reviewers in gaining a deeper understanding of the history and value of EAGLE, its processes and ten principles.
- Understand through dialogue, role playing and sample case studies key considerations for an EAGLE review.
- Hear from experienced commissioners and peer reviewers “what to do” and “what not to do” when assessing an organization’s self-study and during a site visit.

(Peer reviewers must have a minimum of five years of experience in the field and commit to participate in one EAGLE review per year. The online modules must be completed prior to attending the live training session. See our website for full details.)

Tuesday, April 28
1:00 – 2:30 PM

11-A. Reach for Exceptional Governance for a Sustainable Future

- Identify how your organization can create an enduring future by optimizing performance and establishing financial sustainability.
- Realize why organizations need to be intentional about strong governance practices including fiscal stewardship, succession planning and innovation to continue and grow their mission faithfully.
- Hear how Chicago Methodist Senior Services and its strategic board have successfully expanded their reach through strong joint ventures and partnerships.

FACULTY: Eric McRoberts, Partner, RLPS Architects, Lancaster, PA

17-A. Marketing Essentials and Dilemmas for Faith-Based Organizations

- Analyze ways faith-based sponsorship impacts your organization’s marketing and brand image, both positively and negatively.
- Develop strategies to market multiple versions of one brand message tailored to each sub-market and affinity group.
- Learn mistakes to avoid and best practices to employ in marketing to the sponsoring religious organization and affinity group.

FACULTY: April Murray, Director of Business Development, LeaderStat, Powell, OH; Bill Lowe, President and CEO, Chicago Methodist Senior Services, Chicago, IL; Jennifer Schwalm, Partner, Baker Tilly Virchow Krause, LLP, Chicago, IL

3:00 – 4:30 PM

2-B. Using CQI to Increase Capacity to Meet Spiritual Needs

- Understand and apply the CQI plan-do-act-check cycle to problems and issues in a practical way.
- Learn practical tools and templates to complete this critical planning step when addressing the spiritual needs of clients.
- Realize ways to improve the capacity to provide spiritual life services and how to measure the progress towards a desired change.

FACULTY: Deborah Armstrong, Vice President of Quality Improvement, and Lara Raper, Quality Coordinator, The Baby Fold, Normal, IL

7-B. Back to the Future: A Tactical Approach to Preserving Heritage and Building Culture

- Recognize that stewardship of culture must be a key driver for organizational strategy and strength.
- Design and implement tools and tactics to influence culture at all levels and move your organization toward the future while preserving values and heritage.
- Measure the success of thoughtful approaches to embed the desired culture in the behavior of staff.

FACULTY: Rob Moncagle, Vice President for Talent Development and Acquisition, Asbury Communities, Inc., Frederick, MD

12-B. Strategic Reposition for the Future of Senior Living

- Understand the key trends impacting not-for-profit, faith-based senior living providers today including growth, consolidation, repositioning and technology.
- Identify essential, proactive strategies that single and multi-site providers can implement to remain competitive.
- Hear examples from other peer organizations throughout the country who are adapting to meet the needs of the future.

FACULTY: Will Carney, Managing Director, Ziegler, Chicago, IL; David Slack, Chief Strategy Officer, Frasier, Boulder, CO
Wednesday, April 29
10:45 AM – 12:15 PM
3-C. Families First: Keeping Focus in the New Normal
• Receive an overview of a family systems approach that combines parenting groups and family therapy to treating troubled adolescents.
• Learn five key strategies used by the Parenting with Love and Limits (PPL) evidence-based treatment model to facilitate healing.
• Discuss the challenges, successes and adaptations used for family and community engagement in serving families with diverse cultural backgrounds.

FACULTY: John Burek, Chief Executive Officer, and Ellen Souder, Vice President of Clinical Services, Parenting With Love and Limits, Inc., Savannah, GA

8-C. Getting it Right: Finding Your Next Pivotal Leader
• Examine how industry-validated selection tools prevent bias and increase accuracy of leadership.
• Discover the approaches that ensure that your organization selects leaders who fit best with your culture and values.
• Learn ways to build accountability and consensus among managers in leadership hiring.

FACULTY: Aaron Rutnick, Managing Principal, HJ Sims, Rockville, MD; Kevin Anderson, President and CEO, Wesley-Komers, Des Moines, IA; David Bucksthorn, President and CEO, Wesley Commons, Greenwood, SC; John Mitrakos, Principal, Baile Senior Development, Maple Grove, MN

1:30 – 2:30 PM
4-D. The Effects of Caring
• Recognize the adverse impact of ongoing exposure to intense feelings of the clients who have experienced trauma or adverse childhood experiences.
• Gain a deeper understanding of vicarious trauma and compassion fatigue and the impact on counselors and caregivers.
• Explore strategies to assess and improve self-care and combat burnout.

FACULTY: John DiMaggio, Co-Founder and CEO, BlueOrange Compliance, Dublin, OH

19-D. Telling Their Story: Dignity Through Technology
• Hear about the cross country “cruising and crooning” tour that not only celebrated key milestones, but the everyday lives of our members and the people they serve.
• Discover how today’s technology helps improve the health and wellbeing of older adults and hear their inspiring life stories.
• Find out how powerful ideas and meaningful trips down memory lane can strengthen connections for everyone involved.

FACULTY: Jack York, President and co-founder, RUGS, Greenwood Village, CO; Maria Hagadorn, Director of Sales and Development, Aldergate, Charlotte, NC

2:45 – 4:15 PM
5-E. Attachment and Connection Across the Lifespan
• Understand how connection is an essential resiliency factor regardless of age.
• Hear scientific and real-life examples of the value of meeting attachment needs across the lifespan.
• Demonstrate ways the four essential qualities of rewarding relationships can create safety and even prevent and resolve trauma.

FACULTY: Karen Buckwaller, Director of Program Strategy, Chaddock, Quincy, IL; Michelle Robison, Executive Director, Artessa Christian Home, Artesia, CA

22-H. Philanthropy Spring Summit
Engage Your Board and Leadership in Fundraising Strategies
Thursday, April 30 • 2:00 – 4:30 PM • Frasier
Cultivating a fundraising mindset among your board of directors and leadership team is a critical step in implementing a strong culture of philanthropy. It’s only when your board members and leadership team truly embrace fundraising that you and your organization can fully reach your fundraising goals. The key to success is to make the tasks of donor cultivation, acknowledgment, and solicitation simple, fun and – second nature.
In this afternoon workshop, you will discover ways to engage your board along with your leadership team and arm them with tools, resources, and new skills to yield measurable results. Whether you are a team of one or 20 professionals, this event will not only offer you new strategies, but a chance to dialogue with experts and your peers who understand your work and ministry.

FACULTY: Robbie Healey, Vice President for Philanthropy, Simpson Senior Services, Bala Cynwyd, PA; Member Faculty TBD

2.25 CFRE credits pending

14-E. Compliance Duties and Oversight of Governing Boards
• Gain a deeper understanding of the expectations of a governing body related to compliance oversight responsibilities.
• Learn the fundamental structures of a compliance program and effective governance practices.
• Discover strategies to operationalize successful compliance communications with the board to reduce liabilities.

FACULTY: Karla Dreisbach, Vice President of Compliance, Friends Services Alliance, Blue Bell, PA

20-E. Discovering a Diverse Perspective
• Learn about a 71-year-old retirement community, situated in an economically and culturally diverse area, that embarked on a strategic journey to become a more diverse, inclusive community.
• Hear the business case for creating and fostering diverse, caring communities where everyone has a voice and value.
• Discover tools and resources to support organizations striving to engage people of different thoughts, lifestyles, talents, skills, and means.

FACULTY: Suzanne Pugh, President and CEO, Veronica Calderon, Chief Diversity, Inclusion and Equity Officer, and Kathleen Hendrick, Director of Human Resources, Aldergate, Charlotte, NC
Thursday, April 30

8:30 – 10:00 AM

6-F. Ready Your Residential Care for Family First
- Comprehend the requirements to become a Qualified Residential Treatment Program (QRSTP) under the Family First Prevention Services Act (FFPSA).
- Realize why organization-wide quality practices need to be trauma-informed, evidence-based and include strategies for family engagement and effective aftercare.
- Understand the expectations of each approved accrediting body and how best to successfully and proactively prepare for accreditation.

FACULTY:
Jennifer Flowers, Founder and CEO, Accreditation Guru, Inc., Mamaroneck, NY; Laurie Ann Spagnola, President and CEO, Board of Child Care, Baltimore, MD; Jill Myers, Director of EAGLE Accreditation, United Methodist Association of Health and Welfare Ministries, Frederick, MD

15-F. Managing Your Risk: Trends and Preventions in Long-Term Care
- Hear an underwriter’s view of the state of risks and prevention in long-term care.
- Look ahead to the looming trends for the coming decade and the steps your organization can take to prepare.
- Learn about cutting-edge artificial intelligence technology designed to prevent falls.

FACULTY:
Rafael C. Haciski, Vice President of Healthcare, Johnson Kendall Johnson, Newtown, PA

10:15 – 11:45 AM

10-G. Culture Eats Strategy for Lunch and Here's Why!
- Understand why culture is critical to long-term organizational success and ways to accurately identify it in your organization.
- Consider how culture awareness can be an effective tool for recruitment and leadership development strategies.

FACULTY:
J.D. Shuman, President and CEO, The Astbury Foundation, Frederick, MD

16-G. Preparing for a New Way Forward
- Receive an overview of the proposals to General Conference 2020 about the future of The United Methodist Church.
- Dialogue with UMA peers about the impact on UMA ministries of various proposals including their effects on fundraising, branding and trusts.

FACULTY:
Andrew Hendren, General Counsel, Wespath, Glenview, IL; Member Faculty TBD

Continuing Education credit for this event is pending approval by NAB, NASW, and CFRE.
LOCATION
Frasier
SIGN UP for a tour of the community when you register!
350 Ponca Place
Boulder, CO 80303
303-499-4888
Google Map

AIRPORT
DEN - Denver International Airport
41 miles
8500 Peña Blvd, Denver, CO 80249

REGISTER EARLY for discounted prices here.

BUSINESS PARTNER EXPERIENCE SPONSOR PROSPECTUS
Opportunities for this event are available now. Review the details and sign up using this LINK.

LOGGING INFORMATION
UMA has partnered with The Headquarters Hotels:
The Embassy Suites
To reserve your room click here.
2601 Canyon Boulevard
Boulder, Colorado, 80302, USA
1-303-443-2600 or 1-800-HILTONS
$179-$209/per night

Hilton Garden Inn
To reserve your room click here.
2701 Canyon Boulevard, Boulder, Colorado, 80302, USA
1-303-443-2200 or 1-800-HILTONS
$174-$219/per night

TRANSPORTATION
Airport to Hotel
• Mobile App Services LYFT or UBER: $60 - $90 each way for varying levels of service
• We recommend Green Ride shuttle service. Green Ride offers round-trip shuttle transportation to/from Denver airport to Boulder hotels for under $100 roundtrip with discounts for multiple riders. A reservation is required. Visit their website for details and to reserve your ride.

Hotels to Frasier
UMA will provide shuttles to/from Frasier at strategic times during the event. The daily shuttle schedule will be provided in the final meeting materials.

REGISTER EARLY for discounted prices here.

BUSINESS PARTNER EXPERIENCE SPONSOR PROSPECTUS
Opportunities for this event are available now. Review the details and sign up using this LINK.

REGISTER:
https://ouruma.site-ym.com/event/AM2020

FOR MORE INFORMATION:
(ph) 301-556-1340 • (website) www.ouruma.org • (email) AM2020@ouruma.org