



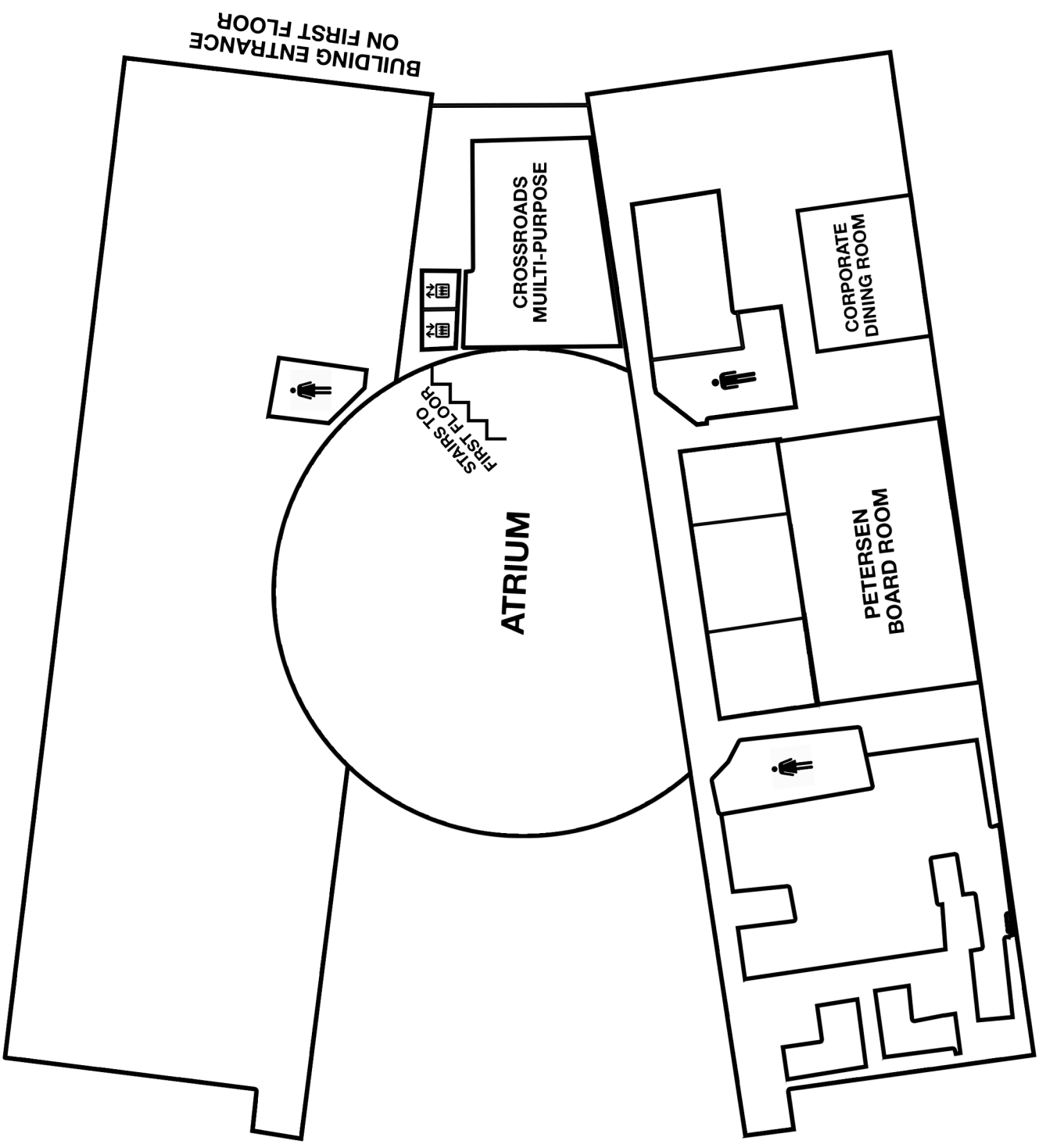
# **National Home Care Cooperatives Conference**

November 6-9, 2017  
Dulles, VA



National Rural Utilities  
Cooperative Finance Corporation

# Atrium Level





# National Home Care Cooperatives Conference

November 6-9, 2017

National Rural Utilities Cooperative Finance Corporation  
20701 Cooperative Way  
Dulles, VA 20166

Special thanks to:

National Rural Utilities Cooperative Finance Corporation for their generous hospitality.  
The Rick Merrill Memorial Fund which supported conference scholarships.

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# Schedule of Events

## MONDAY, NOVEMBER 6

5:00 pm - 6:00 pm

**REGISTRATION OPEN**  
COURTYARD DULLES TOWN CENTER - LOBBY

6:30 pm - 8:00 pm

**Welcome Dinner**  
PF CHANG'S



Join us for a welcome dinner to start the conference and meet other attendees. Please meet in the hotel lobby at 6:15 pm to walk over with the group. See map on page 14.

## TUESDAY, NOVEMBER 7

7:00 am - 8:00 am

**Breakfast**  
COURTYARD DULLES TOWN CENTER - MEETING ROOM A/B

8:00 am - 4:00 pm

**Registration Open**  
NRUCFC - PETERSEN FOYER

### PRE-CONFERENCE PROGRAM For Home Care Providers

CROSSROADS MULTI-PURPOSE ROOM

8:30 am - 10:00 am

**Welcome**  
Leslie Mead, Executive Director, Cooperative Development Foundation

**The PHI Coaching Approach®:  
At the Core of a Supportive Workplace Culture**

Susan Misiorski, National Director of Coaching & Consulting Services, PHI  
MariaElena Del Valle, Organizational Change Consultant, PHI

10:00 am - 10:30 am

**Break**

10:30 am - 12:00 pm

**PHI Coaching Approach (con't)**

12:00 pm - 1:00 pm

**Group Photo & Lunch**

1:00 pm - 2:30 pm

**PHI Coaching Approach (con't)**

2:30 pm - 3:00 pm

**Break**

3:00 pm - 4:30 pm

**PHI Coaching Approach (con't)**

**PRE-CONFERENCE PROGRAM  
For Technical Assistance Providers**

PETERSEN BOARD ROOM

9:00 am - 10:45 am

**Welcome**

**Leslie Mead**, Executive Director, Cooperative Development Foundation

**Developing a Strategic Framework for Home Care  
Cooperative Development**

**Facilitator:**

**Lauren Counts**, Senior Director of Strategy and Innovation, Capital Impact Partners

**Replication Study:**

**David Hammer**, Executive Director, The ICA Group

10:45 am - 11:00 am

**Break**

11:00 am - 12:00 pm

**Discussion**

12:00 pm - 12:45 pm

**Group Photo & Lunch**

12:45 pm - 2:15 pm

**Small Group Discussions**

2:15 pm - 2:30 pm

**Break**

2:30 pm - 3:00 pm

**Wrap up**

**Lauren Counts**, Senior Director of Strategy and Innovation, Capital Impact Partners

5:30 pm - 6:00 pm

**Reception in Hotel**

COURTYARD DULLES TOWN CENTER - LOBBY

6:00 pm

**Dinner**

COURTYARD DULLES TOWN CENTER - MEETING ROOM A/B

*Breaks, lunch, and meeting space provided by the  
National Rural Utilities Cooperative Finance Corporation*



**National Rural Utilities  
Cooperative Finance Corporation**

## WEDNESDAY, NOVEMBER 8

7:00 am - 8:00 am

### **Breakfast**

COURTYARD DULLES TOWN CENTER - MEETING ROOM A/B

8:00 am - 4:00 pm

### **Registration Open**

NRUCFC - PETERSEN FOYER

8:30 am - 8:45 am

### **Welcome & Introductions**

NRUCFC - PETERSEN BOARD ROOM

**Leslie Mead**, Executive Director, Cooperative Development Foundation

8:45 am - 9:00 am

### **What's Up at the Co-op**

NRUCFC - PETERSEN BOARD ROOM

Circle of Life

Wellspring Caregivers

Cooperative Home Care Associates

9:00 am - 9:30 am

### **The U.S. Home Care Landscape**

NRUCFC - PETERSEN BOARD ROOM

*Introduction: Ramata Sakho, Cooperative Home Care Associates, Bronx, NY*

**Peggy Powell**, Senior Advisor, Paraprofessional Healthcare Institute

9:30 am - 10:15 am

### **The U.S. Home Care Landscape**

NRUCFC - PETERSEN BOARD ROOM

*Introduction: Jason Harris, Circle of Life Cooperative, Bellingham, WA*

**David Hammer**, Executive Director, The ICA Group

10:15 am - 10:45 am

### **Break**

NRUCFC - PETERSEN FOYER

10:45 am - 11:00 am

### **What's Up at the Co-op**

NRUCFC - PETERSEN BOARD ROOM

Asheville-Buncombe Institute of Parity Achievement

Heart is Home Cooperative

11:00 am - 12:30 pm

## **Recruitment, Retention and Marketing**

NRUCFC - PETERSEN BOARD ROOM

*Introduction: Jessica Martinez, Heart is Home Cooperative, Hobbs, NM*

### **CONNECTING WITH THE COMMUNITY**

**Kippi Waters**, Administrator, Peninsula Home Care Cooperative

### **LESSONS LEARNED FROM COOPERATIVE CARE RECRUITMENT DRIVE**

**Tracy Dudzinski**, Board Chair, Cooperative Care

**Debra Schultz**, Board Member, Cooperative Care

**Jordan Gabrielson**, Board Member, Cooperative Care

### **RECRUITMENT TOOLKIT**

**Katie Franklin**, Vice President, Finn Partners

12:30 am - 3:00 pm

## **Sector Roundtables and Lunch**

### **OPERATIONS: SHARING BEST PRACTICES**

ATRIUM

**Courtney Berner**, Co-op Development Specialist, UW Center for Cooperatives

**John McNamera**, Co-op Development Specialist, NWCDC

**Jonathan Ward**, Business Consultant, The ICA Group

### **TECHNICAL ASSISTANCE: BEST PRACTICES IN T.A. DELIVERY**

**David Hammer**, Executive Director, The ICA Group

**Diane Gasaway**, Executive Director, NWCDC

### **THE A,B,Cs OF START-UPS**

**Deborah Craig**, Co-op Development Specialist, NWCDC

**Margaret Bau**, Co-op Development Specialist, USDA Rural Development

3:00 pm - 3:30 pm

## **Break**

NRUCFC - PETERSEN FOYER

3:30 pm - 3:45 pm

## **What's Up at the Co-op**

NRUCFC - PETERSEN BOARD ROOM

DC Long-Term Care Coalition

Capital Home Care Cooperative

Cooperative Care

3:45 pm - 4:30 pm

**Measure What Matters**  
NRUCFC - PETERSEN BOARD ROOM

*Introduction: Debra Schultz, Cooperative Care, Wautoma, WI*

**Jonathan Ward**, Business Consultant, The ICA Group

4:30 pm

**Wrap Up**  
NRUCFC - PETERSEN BOARD ROOM

6:00 pm

**Gather for Transportation for Dinner**  
COURTYARD DULLES TOWN CENTER - LOBBY

6:30 pm - 8:00 pm



**Dinner and Bowling**  
BOWL AMERICA-DRANESVILLE

We'll enjoy an evening of pasta, pizza and bowling. We will take Uber cars to the bowling alley. When you are ready to return to the hotel following dinner, talk to Cassie and she will order a car to be charged to CDF.

**THURSDAY, NOVEMBER 9**

7:00 am - 8:00 am

**Breakfast**  
COURTYARD DULLES TOWN CENTER - MEETING ROOM A/B

8:00 am - 12:00 pm

**Registration Open**  
NRUCFC - PETERSEN FOYER

8:30 am - 8:45 am

**What's Up at the Co-op**  
NRUCFC - PETERSEN BOARD ROOM

Peninsula Home Care Cooperative  
eQuality Home Care Cooperative  
Denver Cooperative Initiative

8:45 am - 11:30 am

**Governance and Finance**  
NRUCFC - PETERSEN BOARD ROOM

*Introduction: Teresa Lopez, eQuality HomeCare, New Braunfels, TX*

**Courtney Berner**, Co-op Development Specialist, UW Center for Cooperatives  
**Margaret Lund**, Principle, Co-opera Co

11:30 am - 12:00 pm

**Moving Forward Together: Program Wrap-Up**  
NRUCFC - PETERSEN BOARD ROOM

*Introduction: Patrice Barry, Peninsula Home Care Cooperative, Port Townsend, WA*

**Margaret Bau**, Co-op Development Specialist, USDA Rural Development

12:00 pm

**Lunch To-Go and Adjoin**  
NRUCFC - PETERSEN FOYER

# Thank you to our sponsors

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## SILVER SPONSORS

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# 2017 Speakers



## **Margaret Bau**

Cooperative Development Specialist  
USDA Rural Development  
Stevens Point, WI

Margaret Bau has been a Cooperative Development Specialist with USDA Rural Development since 1998. She has assisted in the formation of over 30 cooperatives across her home state of Wisconsin in a diverse array of industries. Margaret helped organize Cooperative Care, the country's first rural home care workers co-op. Harvard University named Cooperative Care a finalist in the prestigious 2004 Innovations in American Government award. She organized a second worker co-op called the Circle of Care Cooperative. It was a dismal failure following management embezzlement and poor board leadership. These factors have led Margaret and other co-op development leaders to explore systemic supports needed to foster worker co-op success in the home care industry (via coordination by the Cooperative Development Foundation). Margaret now works for the USDA national office as a resource on cooperative development, but remains based in central Wisconsin.



## **Courtney Berner**

Cooperative Development Specialist  
University of Wisconsin Center for Cooperatives  
Madison, WI

Courtney Berner is a cooperative development specialist at the University of Wisconsin Center for Cooperatives where she provides technical assistance and counsel to existing and start-up cooperatives and to business owners interested in exploring conversion to cooperative ownership. Courtney writes and speaks frequently on the co-op business model and most recently co-authored *Successful Cooperative Ownership Transitions: Case Studies and Key Factors for Success in the Conversion of Privately Held Businesses to Worker Cooperatives* with the Democracy At Work Institute. Courtney has worked for the University of Wisconsin Center for Cooperatives for the past seven years.



## **Lauren Counts**

Senior Director of Strategy, Innovation and Impact Management  
Capital Impact Partners  
Arlington, VA

Lauren Counts is Senior Director of Strategy, Innovation and Impact Management for Capital Impact Partners, a national community development financial institution (CDFI). Founded in 1981, Capital Impact Partners has generated over \$2 billion in investments that contribute to the health and well-being of people at every stage of life. Lauren leads strategic planning and development of new products that generate positive social impact and business value. Sectors include health care and education, healthy foods, cooperatives, affordable housing and aging. She serves on the Board of Directors of two national organizations committed to affordable housing and homeownership: ROC USA and Grounded Solutions Network. Previously, she was Director of Inclusive Finance at Enclude Ltd., where she led a multi-national team of access to finance experts across Latin America, Eastern Europe, Asia, and Africa in the areas of small business, housing, agribusiness and clean energy finance. Over the past 20 years, Lauren has worked with commercial banks, microfinance institutions, investment funds, non-profits, foundations, and multilateral agencies to expand access to finance for underserved people globally. She holds a M.A. from Georgetown University's Center for Eurasian, Russian and East European Studies and holds the Chartered Financial Analyst (CFA) designation.



## **Deborah Craig**

Cooperative Development Specialist  
Northwest Cooperative Development Center  
Olympia, WA

Deborah Craig is a Cooperative Development Specialist with the Northwest Cooperative Development Center. Deborah has over 20 years of experience in cooperative management, specializing in human resources in the food co-op and home care co-op sectors. She has a Master's degree from Western Washington University and is a peer advisor with the Democracy at Work Network. Deborah is also part of the first cohort of Democracy at Work Institute's Fellows. Deborah specializes in home care caregiver cooperatives and works with the ROC Northwest program.



**MariaElena Del Valle**

Organizational Change Consultant  
Paraprofessional Healthcare Institute  
Bronx, NY

MariaElena Del Valle works with executive teams, in-house trainers, and supervisors to implement the PHI Coaching Approach throughout organizations. She also conducts a range of other trainings and workshops, as needed, to create a respectful and person-centered work environment.

MariaElena has taught and developed PHI Coaching Supervision skills at Cooperative Home Care Associates, the largest worker-owned home care company in the United States, and Independence Care System, a managed long-term care program that coordinates care for 1400 people with disabilities living in their homes, and multiple other long term care providers around the country.



**Tracy Dudzinski**

Board Chair  
Cooperative Care  
Wautoma, WI

Tracy Dudzinski has been a Certified Nursing Assistant (CNA) since 1996. She started her career as a CNA working in a nursing home. She was there for seven years in various positions, working the floor on all three shifts, working in the kitchen as a cook, and also working in the office as assistant to the administrator. Tracy then moved into home care. When her client switched from one agency to Cooperative Care, she followed him and became an owner-member of that worker cooperative. Tracy has been with Cooperative Care for 12 years. She started in the field working 40 hours per week with one client and is currently working in the office 40 hours a week as administrative coordinator, but still works in the field when a shift needs to be covered. Tracy is also the President of the Board of Directors for the co-op. Tracy participated in a week long national leadership retreat through the Direct Care Alliance, and chaired the DCA Board. She also serves on the board for the Wisconsin Long Term Care Workforce Alliance and the National Domestic Workers Alliance.



**Katie Franklin**

Vice President  
Finn Partners  
Washington, DC

Katie Franklin is Vice President at Finn Partners where she has spearheaded the development and implementation of award winning public relations and public affairs campaigns for clients across industries, with extensive experience driving media campaigns, event planning, consumer education, and grassroots advocacy and congressional relations. From media stunts, to anniversary campaign planning to crisis communications to passing legislation in Congress, Katie works closely with clients to develop and deliver successful programs that fit their strategic organizational needs. Much of Katie’s work is focused in the health, consumer and nonprofit sector and includes campaign work for clients such as the American Kidney Fund, National Cooperative Business Association, Hyundai Hope On Wheels, The Recording Academy, International Council of Shopping Centers, Professional Compounding Centers of America, Bloomberg Philanthropies, and various health and pharmaceutical clients.

Prior to joining Finn Partners, Katie worked for the American Kidney Fund where she developed targeted communication plans and enhanced the organization’s reputation through brand identity and public awareness campaigns. She began her career managing publicity tours for authors and musicians, and has additional experience in the consumer beauty and lifestyle space.

Katie has a bachelor’s degree in Mass Communications with a minor in Political Science from Bloomsburg University of Pennsylvania.



**Jordon Gabrielson**

Board Member  
Cooperative Care  
Wautoma, WI

Jordon Gabrielson began working as a caregiver at Cooperative Care almost two years ago. Jordan came to the profession after caring for his ill father; once his father recovered, Jordan was inspired to make a career out of caregiving and joined Cooperative Care. Jordon now serves on the board and is committed to meeting the cooperative’s goal of helping people who need care stay in their homes.

# 2017 Speakers



## **Diane Gasaway**

Executive Director  
Northwest Cooperative Development Center  
Olympia, WA

Diane joined the Center in 2003 and together with the NWCDC Board of Directors has been responsible for building the Center into what it is today. Her specialty is in strategic planning, co-op education, co-op development, grant administration, and budget management for a multitude of projects. Diane has 13 years of experience in the financial services industry. She received a Master of Public Administration (with a co-op emphasis) from The Evergreen State College.



## **David Hammer**

Executive Director  
The ICA Group  
Northampton, MA

David Hammer is the Executive Director of the ICA Group, a prominent nonprofit consulting firm specializing in worker cooperatives and democratic employee stock ownership plans (ESOPs). David's key areas of expertise include industry research, data analysis, and business and strategic planning. He excels at obtaining and analyzing varied data sources including market research and has extensive experience developing financial models and databases as well as survey design.

Mr. Hammer has been with the ICA Group since 2008. During that time, he has worked on a wide range of business consulting and technical assistance projects including strategic planning, feasibility analysis, business planning, financial modeling and market research. While with ICA Group he coauthored and served as principal researcher for a report for the National Cooperative Grocers Association on the social and economic impact of food cooperatives; was coauthor and principal researcher for a strategic plan for the Green House Initiative, a project of NCB Capital Impact, and was the principal researcher for a strategic business plan for the Paraprofessional Healthcare Institute (PHI), the preeminent research and information source for the home health care industry. Prior to joining ICA, Mr. Hammer worked for a decade doing corporate and industry research for the labor movement, most recently serving as Assistant Director for Research for the 1199 SEIU Healthcare Workers East where he specialized in industry research in the nursing home and long-term care fields.



## **Margaret Lund**

Principle  
Co-opera Co.  
Minneapolis, MN

With over 25 years' experience in the cooperative sector, Margaret Lund is an independent consultant providing technical assistance to businesses and organizations, focusing in the areas of community development finance and shared ownership strategies. Throughout her career, Margaret has worked across cooperative sectors including credit unions, consumer co-ops, housing co-ops, worker co-ops, healthcare and sustainable food systems. Before launching her consulting practice in 2008, Ms. Lund spent 16 years as the Executive Director of the Northcountry Cooperative Development Fund (NCDF), a community development loan fund and multi-faceted development organization for cooperatives of all sectors across the Upper Midwest.

Ms. Lund is a past member of the board of the U.S. National Cooperative Business Association where she chaired both the Cooperative Development and International Development Committees as well as a national task force on cooperative capital formation. She also served three terms on the board of Health Partners, the largest consumer-governed healthcare organization in the United States and a leader in healthcare quality measures. Ms. Lund has been featured as a speaker, trainer and panelist for a wide range of organizations including the National Credit Union Administration, the National Association of Housing Cooperatives, the Consumer Cooperative Managers Association, and the U.S. Federation of Worker Cooperatives. Her awards include the Howard Bowers Cooperative Service Award from the Consumer Cooperative Managers Association and the 2014 John Logue Award for "acting as a catalyst for innovation and change" from the Association of Cooperative Educators.



## **John McNamara**

Cooperative Development Specialist  
Northwest Cooperative Development Center  
Olympia, WA

John McNamara joined NWCDC in the Spring of 2014. John has 26 years of practical experience in the worker cooperative world with Union Cab of Madison. John earned a Masters in Management: Cooperative and Credit Unions from Saint Mary's University (Halifax) in 2010 and currently is a PhD

Candidate in Business Administration (Management). As a student researcher, he assisted in the development of the Co-op Index Report, a tool for measuring co-ops against the values and principles of cooperation. John is a founding member of the Democracy at Work Network and US Federation of Worker Cooperatives. He teaches a summer course on worker cooperatives at The Evergreen State College as well as serving on the Presidio Graduate School faculty for their Cooperative Management Certificate. John co-edited a collection of essays on measuring co-operatives, which is available as an e-book



**Leslie Mead**  
Executive Director  
Cooperative Development Foundation  
Washington, DC

A thirty-year veteran of cooperatives, Ms. Mead spearheads CDF's home care industry focus including coordinating the Development Steering Committee, managing the research agenda, programing the National Home Care Cooperative Conference as well as managing outreach and communications on home care cooperatives to policy makers and the cooperative community. She was an early champion of worker cooperatives in her position as president of The Cooperative Foundation. Today as executive of both foundations, she is steward of over \$7,000,000 of assets for cooperative development and oversees development, fundraising and administration.

Mead began her career with the National Council of Farmer Cooperatives, rising from assistant general counsel to the position of vice president for legal, tax and accounting policy and vice president for education. At NCFC, Mead built consensus among the 100 members of the Legal, Tax and Accounting Committee to develop support for the legislative and regulatory priorities of US farmer cooperatives. In the foundation world, in addition to her work with TCF and CDF, Mead developed the grant making strategy for the Ralph K. Morris Foundation which targets leadership development in the cooperative sector. She also previously served as executive administrator of the Association of Cooperative Educators, an international organization of cooperative educators.



**Susan R. Misiorski**  
Vice President of Workforce Innovations  
Paraprofessional Healthcare Institute  
Bronx, NY

Susan Misiorski, BSN, is the Vice President of Workforce Innovations at PHI. Susan leads a team of trainers and consultants who coach long-term care providers to improve the living and working experience of elders, individuals with disabilities, and workers.

During her tenure at PHI, Susan has worked with a wide range of clients in the for-profit and not-for-profit sectors. Susan provided technical assistance to states participating in the national Better Jobs Better Care demonstration project, and has served as the primary trainer and consultant to multiple nursing homes and home care agencies in the greater New England area. Susan is a regular contributor to new curriculum and product development.

Prior to coming to PHI, Susan served as director of nursing for Genesis Health Care and then as vice president of nursing for Apple Health Care, Inc. where she spearheaded a corporate-wide culture change initiative. Susan is a national speaker on topics related to quality care through quality jobs, recruitment and retention and person-centered care.



**Peggy Powell**  
Senior Advisor  
Paraprofessional Healthcare Institute  
Bronx, NY

Peggy Powell is a Senior Advisor at PHI. In that capacity, she leads PHI's work to strengthen the direct-care workforce through developing innovative approaches to recruitment, training, and supporting frontline workers. She also works with PHI's policy team to advocate for effective public policies that support workforce development in long-term care. In addition, Peggy oversees development of all publicly disseminated curricula.

Peggy has been a part of PHI since its founding, and brings a wealth of organizational planning and training expertise to her current position. She has worked with organizations of all sizes to help structure programs to meet immediate and long-term needs, including: train-the-trainer programs, executive coaching, recruitment and retention strategies, and peer mentoring initiatives.

# 2017 Speakers

She also co-developed the curriculum, *Providing Personal Care Services to Elders and People with Disabilities: A Model Curriculum for Direct-Care Workers* and co-authored numerous other publications aimed at strengthening the direct-care workforce.



## **Jonathan Ward**

Senior Business Consultant  
The ICA Group  
Northampton, MA

Jonathan Ward is Senior Business Consultant with The ICA Group, specializing in financial modeling and data analysis. Before joining The ICA Group, Jonathan worked in sustainable agriculture, providing financing for farm and food businesses and helping small scale farmers with business planning. Jonathan also spent five years at a business consulting firm focusing particularly on optimizing staff training to enhance business performance. He holds a combined MBA and Masters in Public Policy from the University of Massachusetts.

Mr. Ward has worked with various cooperatives and nonprofits providing business modeling and financial analysis services since October, 2011.



## **Debra Schultz**

Board member, Finance Coordinator  
Cooperative Care  
Wautoma, WI

Debra Schultz loves the cooperative culture. She started with Cooperative Care in June of 2006 as a caregiver. After spending most of her adult career in banking, it became necessary to change her career when her mother had a disabling stroke. As she cared for her mother and slowly began caring for others as well, she learned that she loved serving and mentoring others as part of a cooperative worker community. Debra appreciated the member-owner culture, and agreed to serve on the board of directors. With a business background and experience, she advanced to Team Leader at Cooperative Care and has recently become Finance Coordinator for the cooperative. Passion for a democratically run organization and respect for the field of caregiving, propels Debra to continue to work toward providing services to people in our communities who need help.

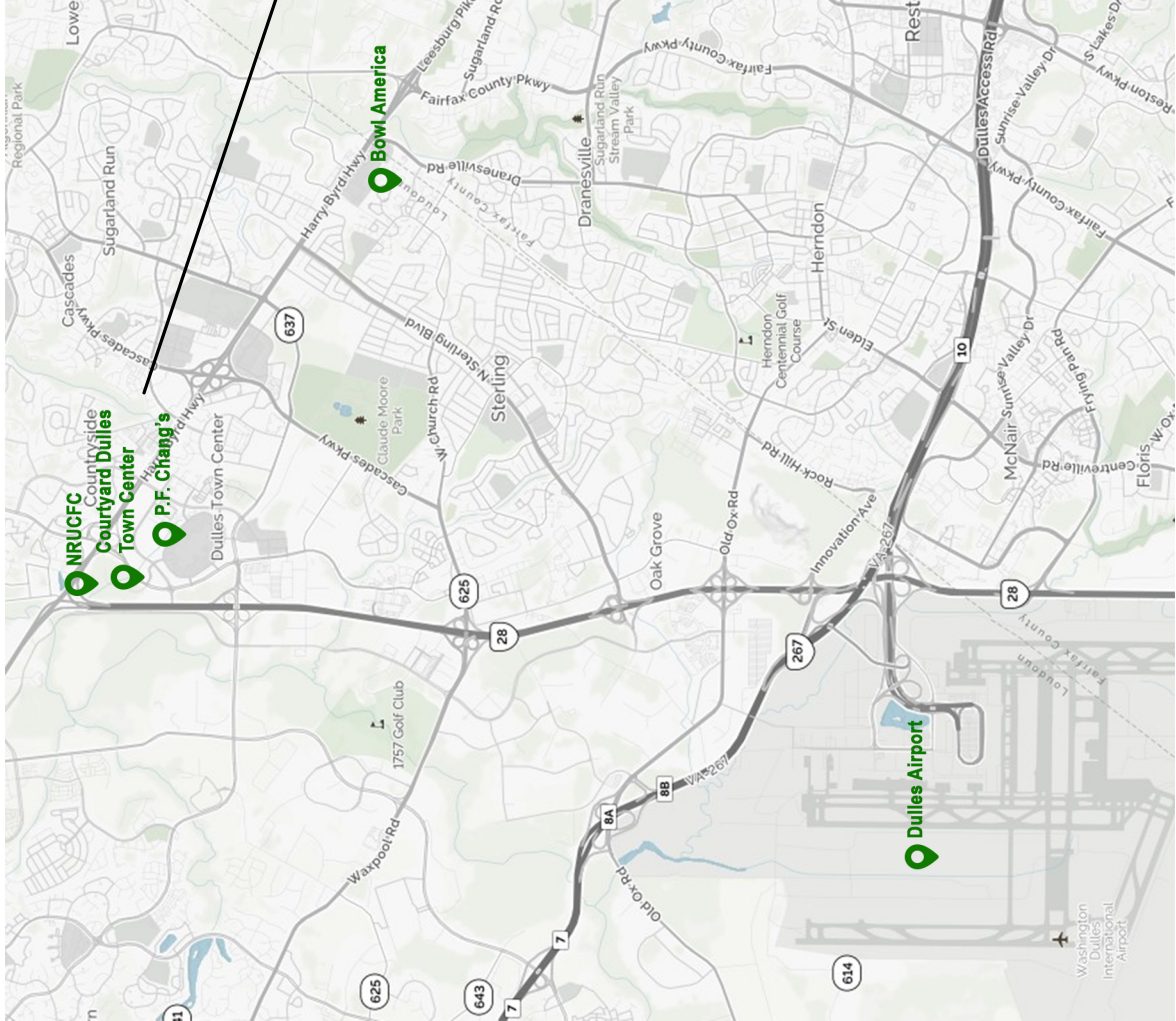


## **Kippi Waters**

Administrator  
Peninsula Homecare Cooperative  
Port Townsend, WA

Kippi Waters has been involved in elder care for 16 years and is co-founder and administrator for Peninsula Homecare Cooperative in Port Townsend, WA. Kippi is an enthusiastic proponent of worker-owner cooperatives and believes the home care cooperative model is the only sustainable means of caring for our elders.

# Area Map of Activities



**NRUCFC - 20701 Cooperative Way, Dulles, VA 20166**

**Courtyard Dulles Town Center - 45500 Majestic Drive, Dulles, VA 20166**

**P.F. Chang's - 21078 Dulles Town Circle, Sterling, VA 20166**

**Bowl America - 46940 Woodson Drive, Sterling, VA**





The Cooperative Development Foundation is a charitable foundation headquartered in Washington, DC. CDF promotes and develops cooperatives to improve economic opportunities for all.

1775 Eye Street NW, 8th Floor  
Washington, DC 20006  
[www.cdf.coop](http://www.cdf.coop)