



Massachusetts  
Councils On Aging



# COA Strong 2017

**MCOA Fall Conference  
Plenary Sessions**



**The STATE of Aging**  
**Wednesday Afternoon**  
**Plenary Session**  
**Sponsored by**  
**Senior Living Residences**  
**Grand Ballroom**  
**12:45pm to 2:15pm**



**Governor**  
**Charlie Baker**

Governor Charlie Baker was inaugurated as the 72nd Governor of the Commonwealth of Massachusetts on January 8th, 2015, after several decades of service in both state government and the private sector.

Since taking office, Governor Baker has been making Massachusetts a great place to live, work and raise a family –

while delivering a customer-service oriented state government that is as hard working as the people of the Commonwealth. Governor Baker believes people are policy and has appointed a bipartisan Cabinet and developed strong relationships with the legislature to work across the aisle and deliver results for our state.

Upon taking office in 2015, Governor Baker worked to close two budget gaps of more than \$2 billion—without raising taxes. The administration has focused on bolstering local aid for our schools and communities, investing in a more reliable public transportation system and prioritizing funds to fight the opioid and heroin epidemic. Governor Baker also delivered critical tax relief for over 400,000 hardworking individuals and their families in his first year through a fifty percent increase of the Earned Income Tax Credit.

Governor Baker has supported robust business sectors by reforming the Commonwealth's regulatory environment, holding the line on taxes, and advancing efforts to rein in energy costs. Governor Baker proposed and signed into law a \$1 billion Economic Development bill to strengthen the Massachusetts economy, promote healthy communities, provide workforce training, invest in innovation, and stimulate private sector job creation across the Commonwealth.

Ensuring Massachusetts continues to be a national leader in education, Governor Baker has invested over \$4.6 billion in Chapter 70 education funding -- the highest level of local education aid in state history.

Confronted with a devastating opioid and heroin epidemic, Governor Baker appointed a working group that has implemented a comprehensive action plan focused on prevention, intervention, treatment and recovery support, including the passage of landmark legislation that features prevention education for students and doctors and the first-in-the-nation seven-day limit on first-time opioid prescriptions. As the co-chair of the National Governors Associations' Health and Human Services committee, Governor Baker has held up the Commonwealth's success as a model for other

states and recently spearheaded a nationwide compact to focus on opioid prescribing guidelines and education programs for athletes.

Met with a historic snowfall during his first winter in office that halted Massachusetts' beleaguered mass transit system, Governor Baker undertook a major overhaul to fix the MBTA by appointing a Fiscal and Management Control Board to oversee the system's operations and finances, and prioritize investments in the core system that over one million daily riders depend upon. The MBTA recently recorded its lowest level of operating expense growth in more than 15 years through cost control, increased own-source revenue by more than \$10 million, and reduced operator absenteeism by nearly 20%.

In line with the customer-service oriented approach he brought to Harvard Pilgrim Health Care, Governor Baker moved quickly to address issues facing the Health Connector and the Registry of Motor Vehicles. Both have seen marked improvements in service, with the RMV finding success in a dual queuing system that has substantially reduced wait times.

Residents and businesses in Massachusetts face some of the highest energy costs in the nation. To stabilize rates, Governor Baker authored and signed into law comprehensive legislation to diversify the Commonwealth's energy portfolio and embrace advanced technologies. Partnering with the legislature, the administration passed provisions to solicit clean energy, including hydropower and offshore wind, and make Massachusetts only the third state to authorize an energy storage procurement goal.

Other milestones include increasing funding for, restructuring, and overhauling procedures and policies at the Department of Children and Families in partnership with SEIU Local 509 with the primary goal of keeping children safe; a new strategic pathway for the Last Mile program to deliver high speed broadband service to under- or unserved communities in Central and Western Massachusetts; and expanding diversity in the state's supply chain.

Over the course of his career, Governor Baker has been a highly successful leader of complex business and government organizations. As a cabinet secretary under Governors William Weld and Paul Cellucci, Governor Baker helped lead efforts to reform and modernize state

government, turn a billion-dollar deficit into a surplus, create a half million jobs, and enact an ambitious education reform agenda.

During his time as Chief Executive Officer of Harvard Pilgrim Health Care, Governor Baker turned a company on the brink of bankruptcy into the nation's highest ranked health care provider for member satisfaction and clinical effectiveness for six straight years.

Raised in Needham, Governor Baker attended Massachusetts public schools and is a graduate of Harvard College. He went on to earn a Master's of Business Administration from the Kellogg Graduate School of Management at Northwestern University, where he met his wife Lauren. The Baker's reside in Swampscott, have been heavily involved in numerous civic and charitable endeavors, and are the proud parents of their three children, Charlie, AJ, and Caroline.



## **Kathleen Otte**

**Regional Administrator, U.S.**

**Administration for Community**

**Living**

**Representing DHHS Regions I and II**

Ms. Kathleen Otte is the Regional Administrator for the U.S. Administration for Community Living (ACL). In this capacity, she represents the Administration and the Assistant Secretary on Aging on all matters related to the implementation of the Older Americans Act (OAA) and other aging related issues within the 8 states and 2 territories she oversees.

Prior to joining ACL, Kathleen served as the Director of the Bureau of Elderly and Adult Services for the State of New Hampshire. Kathleen and the New Hampshire team designed and implemented a caregiver support program that received national distinction by winning the Regional Innovation Award from The Council of State Governments and

implemented the nation's first statewide 'Structured Decision Making' process for Adult Protective Services.

Kathleen has over 30 years' experience in the field of aging, having served or volunteered in various human service delivery programs. In 2014, Kathleen received the Spirit of Jane Addams Award for Outstanding Performance in Social Justice from Be the Evidence, International for her work with Elder Justice Initiatives.



## **Bob Blancato**

### **President, Matz, Blancato and Associates**

Bob Blancato is the President of Matz, Blancato and Associates, located in Washington, D.C. He is the National Coordinator of the bipartisan 3000-member Elder Justice Coalition. He also serves as the Executive Director of the National Association of Nutrition and Aging Services Programs.

Bob has more than 20 years of service in the Congressional and Executive branches, including the senior staff of the U.S. House Select Committee on Aging and an appointment by President Clinton to be Executive Director of the 1995 White House Conference on Aging, one of four Conferences he has participated in.

Bob's volunteer leadership includes currently serving as the Chair of the Board of the American Society on Aging and on the National Board of AARP. He also serves on the Board of the National Council on Aging. In September 2015, Bob was appointed to the Advisory Panel on Outreach and Education of the Centers for Medicaid and Medicare Services.

Bob has also served as volunteer State President of AARP Virginia and as president of the National Committee for the Prevention of Elder Abuse.

Bob is a contributing blogger to the Huffington Post and Next Avenue, writing on aging issues.

He holds a BA from Georgetown University and an MPA from American University. Bob has won numerous awards for advocacy. In 2011, he was knighted by the Italian Republic.



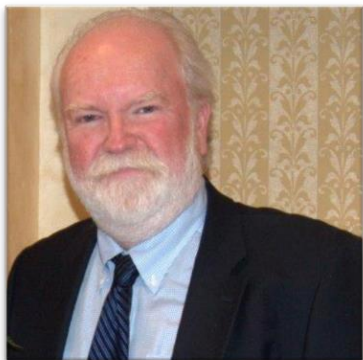
## **Alice Bonner**

### **Secretary, Executive Office of Elder Affairs**

Alice Bonner, Secretary of the Executive Office of Elder Affairs for the Commonwealth of Massachusetts, has been a geriatric nurse practitioner caring for older adults and their families for over 28 years.

From 2009-2011, Dr. Bonner was the Director of the Bureau of Health Care Safety and Quality, at the Massachusetts Department of Public Health. From 2011 to 2013, she served as Director of the Division of Nursing Homes in the Centers for Medicare and Medicaid Services (CMS) in Baltimore, MD.

Dr. Bonner is an Associate Professor in the School of Nursing, Bouve College of Health Sciences and a Faculty Associate in the Center for Health Policy at Northeastern University. Her research interests include quality and safety in health care systems and community-based settings; elder abuse; falls prevention; improving dementia care and reducing unnecessary antipsychotic medication use; and improving care transitions.



## **Brian O'Grady**

President, Massachusetts

Councils on Aging

Director, Williamstown COA

Brian O'Grady has been working with Massachusetts elders, their families and friends since 1985 when he was

hired at Elder Services of Berkshire County as a case manager. He had been working with youthful offenders with mental health diagnosis prior to his changing generations. During his fourteen year tenure at Elder Services he served as the supervisor of the North Adams satellite office and finally as a Home Care Program Supervisor with responsibilities for the client services, Information and Referral, ECOP and Managed Care programs. He became the director of the Williamstown Council on Aging in 1999 thinking that this position would be a stopping point between jobs when fate intervened and he found himself a daily caregiver as first his father and then mother became incapacitated.

Brian remains in Williamstown today. He was selected as Williamstown's Municipal employee of the Year in 2009, Director of the Year for Massachusetts COA in 2015, and was elected President of MCOA in 2016. In April 2017 Brian was appointed by Governor Baker to the Governor's Council to Address Aging in Massachusetts. He serves his local community as the President of the Williamstown Elder Housing Corporation where he was part of a coalition successfully advocating for the creation of replacement housing for the victims of the flooding which accompanied Tropical Storm Irene in 2011. He is Williamstown's representative to the Board of the Berkshire Regional Transit Authority, acts as the secretary for the local Community Chest and sits on the steering committee for the Age Friendly Berkshires effort. He and his wife Alison have two grown daughters, Elizabeth and Meghan and they live in the woods in the shadow of Pine Cobble Mountain with their three cats.



# Thursday Morning Plenary

8:00am to 9:00am

Marblehead

**Alec Graham, JD**

Director of Protective Services  
Executive Office of Elder Affairs

## Massachusetts Elder Protective Services Program Updates for Fiscal Year 2018



The session will provide information on a number recent important changes to the Elder Protective Services Program including: implementation of the state Central Intake Unit, regulation changes regarding investigations, and updates on the new Decisional Capacity Screening tool for Protective Services Workers. Additionally, the session will include a demonstration of the new Protective Services Online Reporting

website and a discussion on EOEAs plan to focus on intervention and service provision for elder abuse cases during Fiscal Year 18.

# **Thursday Afternoon Plenary**

**Sponsored by *myseniorcenter***

## **Grand Ballroom I**

**1:00pm to 2:00pm**



### **Greetings By:**

**John Chapman,  
Undersecretary,  
Massachusetts Office of  
Consumer Affairs and  
Business Regulation**

Appointed by Governor Charlie Baker in January 2015, John C. Chapman serves as the Undersecretary for the Office of Consumer Affairs and Business Regulation (OCABR) for the Commonwealth of Massachusetts. OCABR is comprised of five agencies that include the Division of Insurance, Division of Banks, Department of Telecommunications and Cable, Division of Professional Licensure and the Division of Standards. Undersecretary Chapman is responsible for implementing Governor Baker's agenda on consumer protection and business regulation policies.

Undersecretary Chapman began his career in the Reagan White House within the Office of the Counsel to the President and continued in that Office during the George H.W. Bush Administration. From there Mr. Chapman moved to the U.S. Securities and Exchange Commission, where he led investigations into Wall Street corruption and financial fraud. He previously served in Massachusetts state government as an

Agency Commissioner and Undersecretary of Economic Development under Governor Mitt Romney.

Within the private sector, Undersecretary Chapman has held positions as Vice President and Assistant General Counsel at Tucker Anthony Incorporated, a financial services firm, and as a partner at the law firm of Duane Morris LLP, where he advised corporate clients on enforcement and compliance issues and corporate governance and regulatory matters. In addition, he served in the non-profit sector as General Counsel for the Joslin Diabetes Center, an affiliate of Harvard Medical School, where he provided general and legal advice to the CEO/President, the governing boards, leadership and staff.

Before his recent post in the Baker Administration, Undersecretary Chapman was the Republican nominee and candidate for U.S. Congress in the 9th Congressional District.

Undersecretary Chapman graduated with a B.A. in political science from Kenyon College and a J.D. from Suffolk University Law School.

## Age Out Loud



**Kathleen Otte, Regional  
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for Community Living, Representing  
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and the New Hampshire team designed and implemented a caregiver support program that received national distinction by winning the Regional Innovation Award from The Council of State Governments and implemented the nation's first statewide 'Structured Decision Making' process for Adult Protective Services.

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## **Jim Firman, President and CEO, National Council on Aging**

For more than 35 years, James Firman, EdD, has been a leading force for innovation in services, programs, and public policies for older adults.

Under his leadership, NCOA has developed many nationally acclaimed programs to improve the health, independence, and economic security of older Americans. NCOA also has built core competencies in collaborative leadership, fostering and scaling evidence-based innovations, and advocacy.

Since becoming president and CEO in January 1995, Firman has led NCOA to become the national leader in benefits access, economic security, falls prevention, evidence-based healthy aging programs, and public policy for older adults, especially those who are struggling. In recent years, Firman created and launched NCOA's [Aging Mastery Program](#)<sup>®</sup>, an innovative effort to develop new expectations, norms, and pathways for people to make the most of their gift of longevity.

Prior to joining NCOA, Firman was founder and CEO of the United Seniors Health Cooperative (USHC), a nonprofit consumer organization. At USHC, he directed the development of the early version of [BenefitsCheckUp](#)<sup>®</sup>, now one of NCOA's core bodies of work.

Also at USHC, he oversaw the development of one of the nation's first insurance counseling programs for older adults, which helped lead to the development of the national Health Insurance Counseling and Advocacy Program (HICAP). As an advocate, he significantly influenced the development of federal Medigap legislation and long-term care insurance regulations throughout the United States.

From 1981 to 1984, Firman served as a senior program officer at The Robert Wood Johnson Foundation, where he helped develop initiatives in aging and health care finance, as well as the Interfaith Volunteer Caregivers program.

Firman has served in several national leadership roles, including Chair of the Leadership Council of Aging Organizations (three times), Board Chair of the National Human Services Assembly, and Chair of the Independent Sector's National Advisory Committee on Charting Social Impact.

In 2015, NextAvenue named Firman to their inaugural [Influencers in Aging](#) list. He was one of 50 thought leaders, innovators, writers, advocates, experts, and others recognized for their work changing how we age and think about aging.

Firman also has been named to [The NonProfit Times' Power & Influence Top 50](#) four times. According to the publication, "Many in the aging community describe Firman as an entrepreneur and leader on innovation in services, programs, and public policies. Setting goals that are specific, achievable, and targeted, few hold themselves so specifically accountable and have had their hands in so many areas of regulation and legislation resulting in impactful change."

Firman earned his MBA and his EdD from Columbia University.



**Brinn Sullivan, President  
of NH Association of  
Senior Centers and City of  
Portsmouth's Senior  
Services Supervisor**

As the Senior Services Supervisor for the City of Portsmouth, Brinn manages a Senior Activity Center

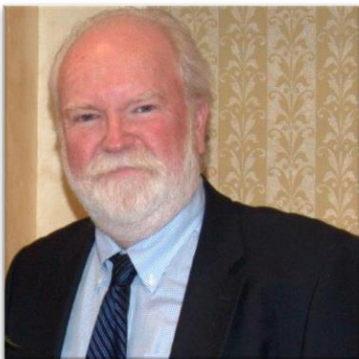
and works in partnership with various agencies to provide healthy activities and resources for seniors. She is also President of the NH Association of Senior Centers and member of the Falls Prevention Committee for the Seacoast Public Health Network. For 10 years prior, Brinn was a program coordinator for the City of Rochester, NH Department of Recreation & Arena designing and implementing programs for people of all ages. Brinn started her career in Boston at the New England Aquarium as a volunteer manager supporting volunteers donating over 100,000 hours of service annually. Additionally, she volunteers her time as a Marine Mammal Rescue Team volunteer for the Seacoast Science Center. Originally from Cape Cod, Brinn moved to New Hampshire in 1999 and lives in Exeter with her husband and 4 daughters.



**Rick Liegl, Director,  
Windsor, CT, Senior  
Center, President CASCP**

Rick Liegl has been working in Senior Services his entire professional career. At the age of 22 he was working as a Therapeutic Recreation Director of a Memory Care unit in a Nursing Home in Enfield

Connecticut. After a few years there he moved to the position of Engage Life Director of an Assisted Living Facility in Rocky Hill. There he won a national award for a program called "The Greenridge Gourmets". Rick would take a group of seniors to lunch every Friday to local restaurants, the seniors would grade their experience from a seniors' point of view and the review was published in a local newspaper for free. This was a win for the Assisted Living Community, the local restaurants and also the seniors who were empowered to share their valuable opinions. Next, Rick moved to a position as the Senior Center Director for the Town of Windsor CT. There he oversaw the Senior Center, transportation, managed staff, programs, grants and also participated in the planning of a major renovation of the Senior Center. After 5 years, Rick became the Senior Affairs Administrator for the City of Meriden, CT. In his current position he has overseen the updating of many rooms of the Senior Center and also many of the processes, policies and procedures of the Senior Center. In 2016 he was voted the President of CASCP, Connecticut's Association of Senior Center Personnel and he is currently in his second year in that role. He and his board have revitalized CASCP with monthly roundtables, increased membership, and well attended conferences.



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