

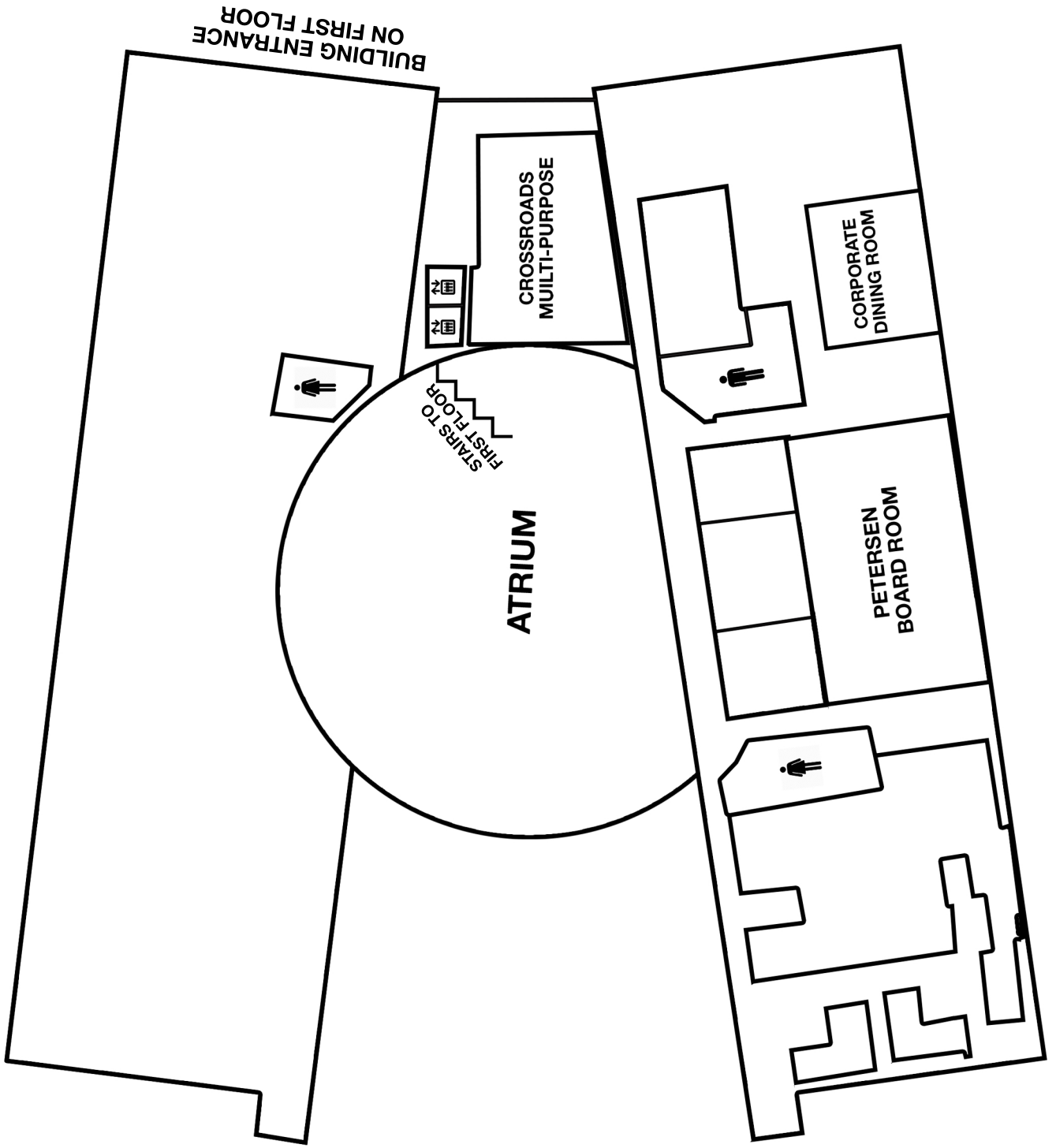
A stylized graphic featuring two human figures, one in pink on the left and one in light blue on the right, holding hands to form a heart shape. The background is white with yellow geometric shapes at the top and bottom. The conference title is centered within the heart.

# **National Home Care Cooperatives Conference**

September 12-14, 2016  
Washington, DC (Dulles, VA)



# Atrium Level





# National Home Care Cooperatives Conference

September 12-14, 2016

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

**ALL EVENTS ARE IN THE PETERSEN BOARD ROOM UNLESS OTHERWISE NOTED**

## *Special Thanks:*

- National Rural Utilities Cooperative Finance Corporation for their generous hospitality
- CHS Inc. for travel and lodging support for home care cooperative members


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# Schedule of Events

## MONDAY, SEPTEMBER 12

5:00 pm - 6:00 pm      **Registration Open**  
COURTYARD DULLES TOWN CENTER - LOBBY

6:30 pm - 8:00 pm      **Welcome Dinner**  
PF CHANGS

 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, SEPTEMBER 13

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 - 8:50 am      **Welcome & Introductions**  
NRUCFC - PETERSEN BOARD ROOM

*Judy Ziewacz, President & CEO, NCBA CLUSA*  
*Leslie Mead, Executive Director, Cooperative Development Foundation*

8:50 am - 9:05 am      **My Co-op in Two Minutes**  
NRUCFC - PETERSEN BOARD ROOM

<i>Cooperative Care</i>	<i>Peninsula Home Care Cooperative</i>
<i>Golden Steps</i>	<i>Western North Carolina Home Care Co-op Initiative</i>

9:05 am - 10:05 am      **Opportunities and Challenges for Home Care Worker Cooperatives**  
NRUCFC - PETERSEN BOARD ROOM

*David Hammer, Executive Director, The ICA Group*

10:05 am - 10:25 am      **Break**  
NRUCFC - PETERSEN FOYER



10:25 am - 10:40 am      **My Co-op in Two Minutes**  
NRUCFC - PETERSEN BOARD ROOM

<i>Circle of Life</i>	<i>Cooperative Home Care Associates</i>
<i>Courage</i>	<i>Metro Denver Home Care Co-op Initiative</i>

10:40 am - 11:40 am **Becoming the Employer of Choice: Recruitment, Retention and Training**  
NRUCFC - PETERSEN BOARD ROOM

*Jodi Sturgeon, President, Paraprofessional Healthcare Institute*  
*Thomas Showalter, Director, National Youth Employment Coalition*

11:40 am - 1:00 pm **Sector Roundtables and Lunch**  
NRUCFC



**Board Roundtable**  
ATRIUM

*Co-Chair: Tracy Dubzinski, Board Chair, Cooperative Care*  
*Co-Chair: Anne Reynolds, Executive Director, University of Wisconsin Center for Cooperatives*

**Technical Assistance Roundtable**  
CROSSROADS MULTI-PURPOSE ROOM

*Co-Chair: David Hammer, Executive Director, The ICA Group*  
*Co-Chair: Margaret Lund, Principle, Co-opera Co.*

**Start-up Roundtable**  
CORPORATE DINING ROOM

*Co-Chair: Dana Howarth, Program Assistant, New Mexico Direct Caregivers Coalition*  
*Co-Chair: Deborah Craig, Cooperative Development Specialist, Northwest Cooperative Development Center*

1:00 pm - 1:15 pm **My Co-op in Two Minutes**  
NRUCFC - PETERSEN BOARD ROOM

*eQuality*                      *Capital Home Care Cooperative*  
*Home Care Associates*   *Floyd Care Cooperative*

1:15 pm - 3:00 pm **Marketing Your Cooperative to Caregivers and Clients**  
NRUCFC - PETERSEN BOARD ROOM

**What Sets You Apart from Your Competitors:**  
**Marketing Cooperative Values**

*Jessica Ross, Managing Partner, Finn Partners*  
*Katie Franklin, Vice President, Finn Partners*

**Guerrilla Marketing and Other Stealthy Approaches to Marketing on a Shoestring**

*Deborah Craig, Cooperative Development Specialist, Northwest Cooperative Development Center*

**Workers to Owners: Membership Education Tools**

*Victoria Sprong, Caregiver Coordinator, Circle of Life Cooperative*

3:00 pm - 3:15 pm



**Break**  
NRUCFC - PETERSEN FOYER

3:15 pm - 3:25 pm

**My Co-op in Two Minutes**  
NRUCFC - PETERSEN BOARD ROOM  
*Heart is Home      DC Coalition on Long Term Care*

3:25 pm - 4:25 pm

**Managing Human Resource Issues in a Home Care Worker Cooperative**  
NRUCFC - PETERSEN BOARD ROOM  
*Joe Marraffino, Cooperative Development Specialist,  
Democracy at Work Institute*

5:30 pm - 6:30 pm



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

6:30 pm - 11:00 pm



**Washington DC Monument Tour**  
TOUR BUSES DEPART FROM HOTEL

## WEDNESDAY, SEPTEMBER 14

7:00 am - 8:00 am

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

8:00 am - 11:00 am

**Registration Open**  
NRUCFC - PETERSEN FOYER

8:30 am - 10:30 am

**Governance and Finance**  
NRUCFC - PETERSEN BOARD ROOM  
*Anne Reynolds, Executive Director, University of Wisconsin  
Center for Cooperatives  
Margaret Lund, Principle, Co-opera Co.*

10:30 am - 11:00 am



**Break**  
NRUCFC - PETERSEN FOYER

11:00 am - 12:00 pm

**Moving Forward Together: Program Wrap-Up**  
NRUCFC - PETERSEN BOARD ROOM  
*Margaret Bau, Cooperative Development Specialist, USDA Rural Development*

12:00 pm



**Lunch and Adjourn**  
NRUCFC - PETERSEN FOYER

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# 2016 Speakers

**Margaret Bau**

Cooperative Development Specialist  
USDA Rural Development

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.

**Deborah Craig**

Cooperative Development Specialist  
Northwest Cooperative Development Center

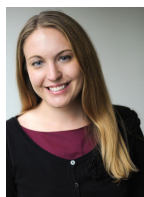
Deborah Craig is a Cooperative Development Specialist at the Northwest Cooperative Development Center. She joined NWCDC in 2014. Deborah has over 20 years of experience in cooperative management, specializing in Human Resources in the Food Co-op and Home Care Co-op industries. She has a Master's degree from Western Washington University and is a peer adviser with the Democracy at Work Network. Deborah is also part of the first cohort of Democracy at Work Institute's Fellows.

**Tracy Dudzinski**

Board Chair  
Cooperative Care

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

Katie Franklin is a Vice President at Finn Partners. In this role, 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.

**David Hammer**

Executive Director  
The ICA Group

David Hammer joined the ICA Group in 2008 and served as a Senior Business Consultant until assuming the position of Executive Director in June 2013. He has spent his career working for organizations dedicated to empowering workers and the communities in which they live. David's areas of expertise include market research, business planning, governance, policy analysis, data analysis, and financial modeling.

Prior to joining the ICA Group David served as Assistant Director of Research of 1199SEIU, a 300,000 member health care union with members in New York, Massachusetts, Maryland and Washington DC. Previously he conducted research for UNITE in New York City and the United Steelworkers of America in Pittsburgh. David has worked on a wide variety of projects throughout the country in industries as diverse as long term care, industrial laundries, apparel distribution, food retail, tire manufacturing, temporary staffing, hospitality, aluminum can manufacturing, as well as various small manufacturing settings.

He lives with his wife and two children outside of Boston. David earned a Master's of Science from the Labor Relations and Research Center at the University of Massachusetts, Amherst and a Bachelor's degree in History from UMass, Amherst.

**Dana Howarth**

Program Assistant  
New Mexico Direct Caregivers Coalition

Dana Howarth, Program Assistant for the New Mexico Direct Caregivers Coalition, is a native New Mexican who received her bachelor's degree in Family Studies from the University of New Mexico in 2013. Dana enjoys traveling, spending time with her family and volunteering in her community. She has always enjoyed being involved with organizations that were created to help others and is thankful to be working with NMDCC, because she has the opportunity to work with caregivers and make a difference in the state of New Mexico.

**Margaret Lund**

Principle  
Co-opera Co.

Margaret Lund is an independent consultant specializing 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. Prior to launching her consulting practice in 2008, Ms. Lund spent 16 years as a small business lender to cooperatives.

Ms. Lund is a past member of the board of the 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.

Past 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.

**Joe Marraffino**

Cooperative Development Specialist  
Democracy at Work Institute

Joe Marraffino joined the Democracy at Work Institute in 2015. He works with the Workers to Owners program focusing on collaboration, tool-building and training for worker cooperative conversions. Joe was the Finance Manager for GreenStar Cooperative Market in Ithaca for three years. Previous to that he was a worker-owner of Arizmendi Bakery in San Francisco for seven years, and worked as a bookkeeper and business developer for the Arizmendi Association of Cooperatives to help launch two bakeries. Joe was a founding member of the New York Cooperative Network and the Democracy at Work Network. He lives in Ithaca, New York.

**Leslie Mead**

Executive Director  
Cooperative Development Foundation

A thirty-year veteran of cooperatives, Leslie spearheads the Foundation's home care industry focus including coordinating the Development Steering Committee, managing the research agenda, programming the National Home Care Conference and policy work. As Executive Director of CDF and President of The Cooperative Foundation, she stewards over \$7,000,000 of assets for cooperative development. 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. She also served previously as Executive Administrator of the Association of Cooperative Educators, an international organization of cooperative educators.

**Anne Reynolds**

Executive Director  
University of Wisconsin Center for Cooperatives

Anne Reynolds is the Executive Director of the University of Wisconsin Center for Cooperatives. She develops courses, conferences and educational programs at the Center, and has led numerous workshops on board leadership, board roles and responsibilities and strategic planning. Her areas of interest include governance, member loyalty, business structure and innovative uses of the cooperative model. She has worked with cooperatives in all sectors, including agriculture, food, energy, purchasing and worker-owned. Anne serves on several boards, including The Cooperative Foundation and Shared Capital Cooperative. Before joining the Center for Cooperatives, she worked at the Credit Union National Association (CUNA).

**Jessica Ross**

Managing Partner  
Finn Partners

Jessica Ross is Managing Partner of Finn Partners' Washington, DC office, and she leads the agency's Public Affairs practice. Jessica has more than 25 years of experience blending political, public affairs and public relations experience into winning communications strategies for clients. Jessica provides strategic counsel to clients on multi-channel communications with a special focus on the intersection of business and government--focusing on strategy development and on ensuring the integration of agency services.

As the head of Public Affairs, Jessica leads the agency's work on federal and state advocacy, third party and grassroots mobilization and media campaigns that hit both inside the Beltway and targeted congressional districts. Jessica also serves as a core member of the agency's cross functional crisis communications practice—helping clients with crisis assessment, preparedness and response.

Current clients include advocacy work for the Grammy Awards organization The Recording Academy, media outreach and strategic counsel for Bloomberg Philanthropies, the National

# 2016 Speakers

Cooperative Business Association, and promoting the burgeoning NoMa neighborhood in Washington, DC. Jessica's recent work also includes the efairness campaign for the International Council of Shopping Centers, voted best Public Affairs campaign in 2013; as well as the multiple-award winning U.S. Korea Connect Program—focused on grassroots outreach and stakeholder mobilization for free trade.

Jessica began her career on Capitol Hill as a congressional aide, and she holds a Masters Degree in Legislative Affairs from The George Washington University.

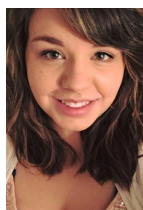


## **Thomas Showalter**

Director

National Youth Employment Coalition

Thomas Showalter is an expert on education and workforce policy and related areas (disability policy, juvenile justice, antipoverty programs), as well as Congressional politics and processes. As the director of the National Youth Employment Coalition, Thomas sets the organization's direction and strategy, working with the board of directors, and lifts up promising strategies and practices of NYEC members. Before coming to NYEC, Thomas advised advocacy organizations and foundations on communications and strategic planning at The Hatcher Group, a Bethesda-based communications firm. He also spent almost five years on the majority staff of the U.S. Senate Health, Education, Labor, and Pensions Committee, working for chairmen Edward M. Kennedy (D-MA) and Tom Harkin (D-IA). With the committee, he contributed to the passage of several pieces of legislation, including the Serve America Act of 2009 and the Health Care and Education Reconciliation Act of 2010, and was a negotiator on proposed reauthorizations of the Elementary and Secondary Education Act and Workforce Investment Act. He is a court-appointed special advocate for a young man in the DC foster-care system and holds a religion degree from Swarthmore College in Pennsylvania.



## **Victoria Sprong**

Caregiver Coordinator

Circle of Life Cooperative

Victoria Sprong joined Circle of Life Caregiver Cooperative in 2012, in her time at COL she has been a member-owner, served as the Chair of the COL Board of Directors and is now the Caregiver Coordinator of this 50-plus member-owned cooperative. Victoria has been working in the home care industry for 5 years and is very passionate about how worker co-ops can change the treatment and wages of direct care professionals. Victoria is originally from Manitoba, Canada and now makes her home in Bellingham, Washington.

**Jodi Sturgeon**

President

Paraprofessional Healthcare Institute

As PHI's President, Jodi Sturgeon is responsible for the organization's programmatic and strategic direction, as well as its operations. She has two decades of nonprofit management experience, bringing eight years of executive experience to her role as President. Prior to her position as PHI Vice President, she had held the position of Chief Operating & Financial Officer, introducing innovations that strengthened PHI's infrastructure and mission.

Jodi served formerly as Vice President for a statewide Community Development Financial Institution, helping to strengthen housing, community facilities, jobs, and services for low-income individuals and families in New Hampshire. She currently serves as the Board Treasurer for PHI's founding affiliate, the Bronx-based Cooperative Home Care Associates, and serves on the Board of Directors for PHI, its affiliate Managed Long-Term Care plan Independence Care System in New York, and its affiliate Home Care Associates of Philadelphia. She has a B.S. in Accounting and did graduate work at Southern New Hampshire University, with a concentration in Nonprofit Finance that included an advanced certificate in Governmental Finance.

Under her leadership, PHI is promoting a strategic understanding of direct care work as one of few growing employment opportunities for women and families in low-income communities. She sees investing in training, support, fair compensation, and advancement for caregivers as not only a social justice issue, but as an essential step toward strengthening our nation's fractured health care system.

**Judy Ziewacz**

President and CEO

National Cooperative Business Association CLUSA International

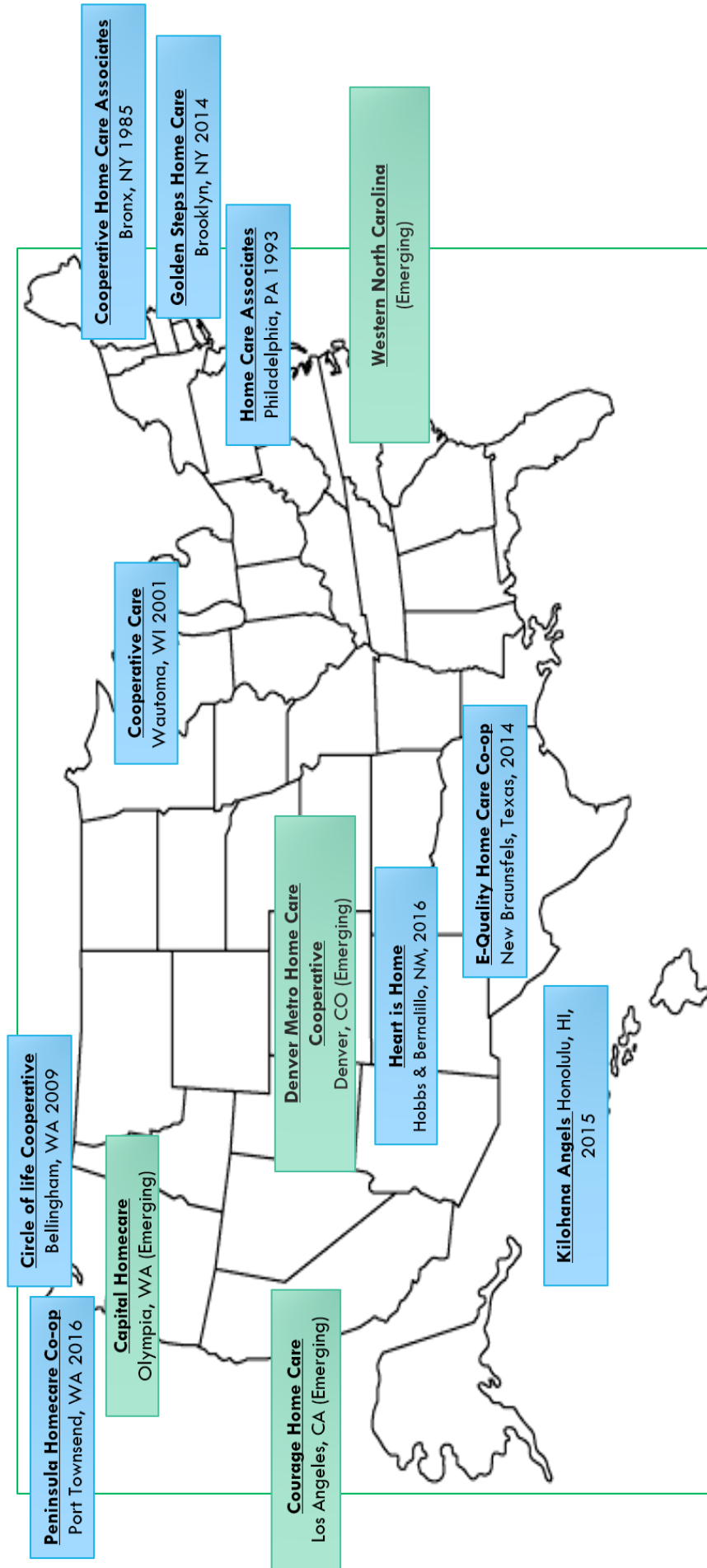
Judy Ziewacz is the President and Chief Executive Officer of the National Cooperative Business Association and its CLUSA International Program.

For more than 35 years, Ziewacz has championed cooperative development. In 1985, she was instrumental in launching the nation's first statewide co-op development center: the Wisconsin Cooperative Development Council, now known as Cooperative Development Services.

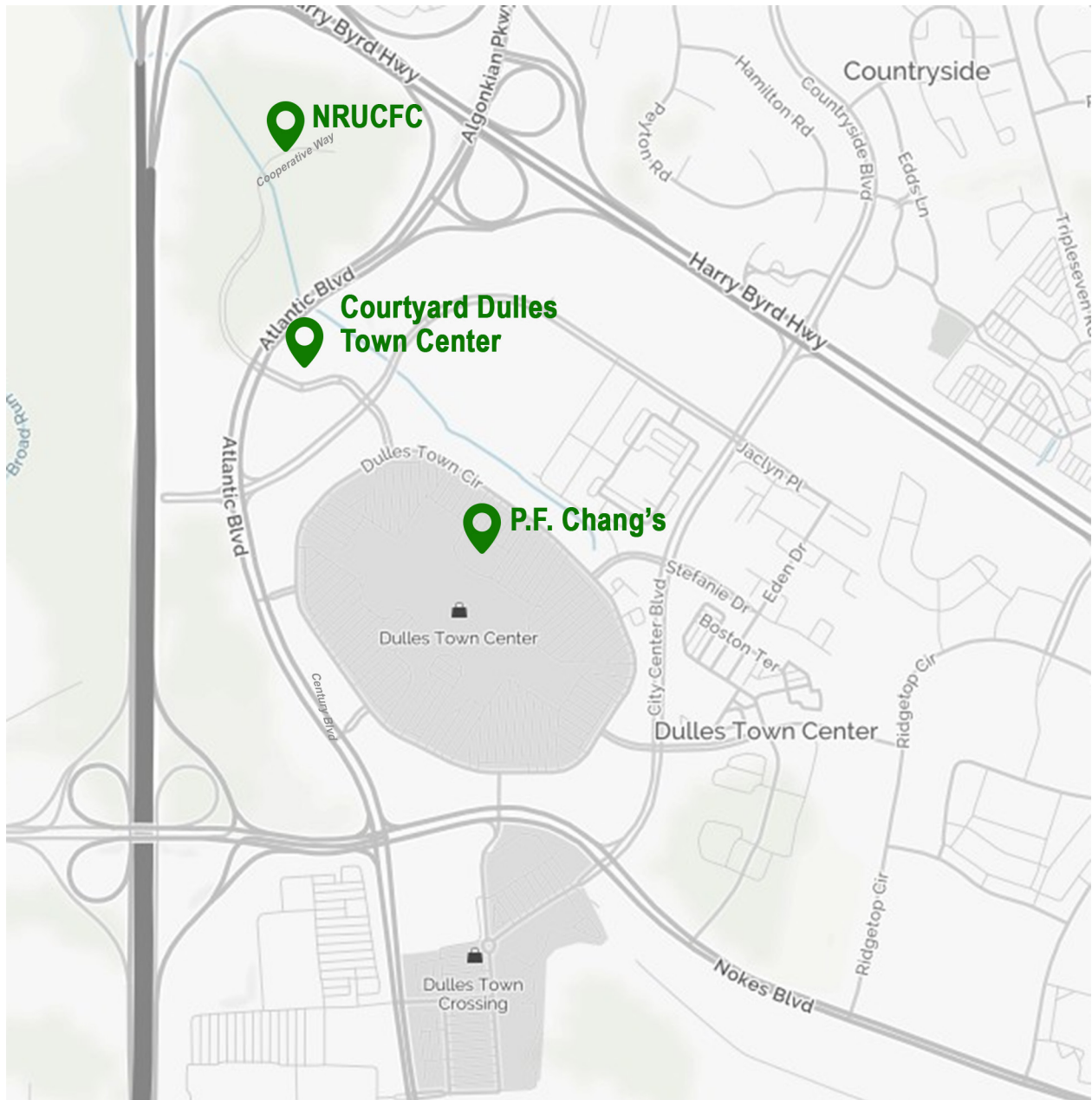
She was a driving force behind the establishment and funding of the Rural Cooperative Development Grant (RCDG) Program in the 1990 Farm Bill. In 1996, she became the executive director of the Cooperative Development Foundation and later led the application process to secure dotCoop as a new Top Level Domain (TLD) for use by the international cooperative community. She has served on the boards of the National Cooperative Bank and Capital Impact Partners and currently is a director of Group Health Cooperative of South Central Wisconsin.



## MAP OF HOMECARE COOPERATIVES IN AMERICA



# Dulles 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**



*Cooperative Development Foundation*

The Cooperative Development Foundation is a charitable foundation headquartered in Washington, DC. CDF's mission is to promote community, economic and social development through cooperative enterprises.

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[www.cdf.coop](http://www.cdf.coop)