

Caragonne and Associates, LLC — Announce the
Second Leisure and Learn Workshop
April 23, 2010 to April 26, 2010 – Ajijic, Jalisco Mexico
Time is running out! Please contact us directly at
mail@caragonne.com for information about registration and lodging.



***Starting and Sustaining a
Life Care Planning Enterprise
In the Current Recession***
**Maintaining a Competitive Practice
in Today's Environment**

The Second Annual Leisure and Learn Workshop will be held April 23, 2010 through April 26, 2010 in Ajijic, Jalisco, MX. This year's Workshop will focus on how to successfully launch, manage, build and maintain a viable life care planning practice.

The Workshop is modeled on the successful group processes and direct peer support that characterized early life care planning course work in the 90's. The workshop is created to give

participants a network of collegial support, experience the sense of profession often absent in on-line course work, and see the value of socialization as an adjunct to learning.

Whether you're a newly minted life care planner pondering "what to do" with your certification or an experienced expert wanting to "refresh" your skills and knowledge, the Leisure and Learn has content to meet your needs.

***Sunset on
Lake Chapala***



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Training, Instruction and Participation

The Workshop envisions three elements as the “building blocks” for an expert consulting practice. Content about each is included to provide seasoned and fledgling life care planners with:

Instruction on the range of financial, logistical, and ethical decisions required to sustain an independent consulting practice

Training in the scientific, critical thinking, problem-solving, and research skills crucial to life care planning

Direct participation in learning experiences designed to improve and solidify the skills and abilities required of a forensic expert

The Challenge of Today's Business Environment for Life Care Planners

If you're thinking of setting up your first consulting practice, this workshop will teach you the legal, marketing, accounting, contractual, and collection supports you'll need to sustain your practice and raise your profile in the life care planning marketplace. If already in practice, you will learn ways to reduce your overhead, understand the latest in work and office technology, increase your research, critical thinking and problem-solving skills and solidify your testifying abilities.

Our desire is that participants can return home with renewed confidence about the choices they will face in their work—better able to use their skills to analyze how they work, how they wish to work, and how they can work with less stress.

The current economic downturn has made it hard for new and veteran life care planner alike. Starting—and sustaining—an expert practice is challenging in today's business context. Life care planners practice in an increasingly rigorous and uncertain environment. Lawyers more aggressively

monitor work products they receive. Underwriters frequently audit bills submitted. Law firms and underwriters pay more slowly. In the context of increasingly conservative consulting and payment practices, experts need to sharpen their skills as life care planners, preserve their financial resources, and—at the same time—streamline their work.

This Leisure and Learn is targeted to two groups: experts starting a first consulting endeavor, and, experienced solo practitioners who want to improve their skills, but not drain valuable financial resources to do so. For veteran practitioners, the workshop will increase their productivity and work quality. For new planners, the workshop will acquaint them with the ethical, financial, and logistical decisions they will face in their practices.

The pool of available life care planners has increased exponentially, while getting, keeping and being reimbursed for work has become more difficult. “21st century” consulting models can bridge this dilemma, helping expert planners to be skilled, competitive, cost-effective expert witnesses.

2010 WORKSHOP FACULTY:

- **Steven A. Adelman, Esq.**
- **Penelope Caragonne, Ph.D., CLCP**
- **Julia A. Finn, BSN, RN, CCM, CLCP**
- **Liz Holakiewicz, RN, CCM, CNLCP**
- **Valerie Knafelc, SLP, CLCP**
- **Kathryn Reid, MA, CRC, CCM**
- **Susan Sheerin, RN, CLCP, MSCC**
- **Keith Sofka, Assistive Technology Specialist**
- **David Stein, Ph.D., CLCP, Consultant**

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The Schedule of Workshops

Thursday, April 22, 2010

6:00 pm to 8:00 pm

Welcome Reception — Bebidas, Botanas, Baile

Calle Hidalgo #79

Sponsored by the Leisure and Learn faculty, Office of Mayor-Elect of Chapala and the Chapala Department of Tourism

Friday, April 23, 2010

8:00 am to 10:00 am

Part 1 — Ethics Practicum:

Developing and Maintaining the Ethics-Driven Practice

Susan Sheerin, RN, CLCP, MSCC

This is the first of four two-hour sessions on ethics. By the end of the workshop, participants will satisfy the eight-hours of ethics requirements for renewal of the CLCP certification. The course is designed to offer ample opportunities for practical experience presenting typical ethical dilemmas faced by a life care planner. The course will cover: how to develop an ethics-driven practice and will focus on personal ethics, the ethics of working with other life care planners, ethics within the business context, ethical work with persons with disabilities, and ethics of working with attorney clients.

10:00 am to 10:15 am

Break

10:15 am to 1:15 pm

The 21st Century Office

Keith Sofka

The idea of an almost paperless and portable office is not new. Since the very beginning of computing, some visionaries have imagined the computer as an all-in-one solution that could integrate virtually every aspect of our lives. This workshop will answer your questions related to: why you should consider a portable office, how to identify and select the basic equipment, networking and wireless connections, digital cameras, telephones and PDA's, the types of software required, upgrades to hardware and software, how to scan your files and why, file storage, data backups, handling large files, creating your professional website, finding files stored on your computer and e-mail and issues regarding privacy, confidentiality and discovery.



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Friday, April 23, 2010 — Continued

1:15 pm to 3:30 pm

Starting, Maintaining and Protecting Your Practice

Penelope Caragonne, Ph.D. & Julia A. Finn, BSN, RN, CCM, CLCP

This session is designed to support planners “gearing up” to start their first practice. It also includes content for those who want to “fine-tune” their business model, particularly in the current period where referrers are slow to pay and business costs are rising. This workshop will review the basics of setting up a practice including: methods for reducing administrative costs, how, when, if and where to market; non-traditional marketing, how to set a fee structure for consulting and testimony; key sections of a Letter of Agreement; the purpose and importance of “up-front” retainers and their use in final bill payment. The session includes information on when and how frequently to bill, when to stop work due to lack of payment, and when and where to institute collection actions. The critical benefits of legal support in collecting fees from attorneys and other referral sources will be outlined, as will other benefits of legal and accounting consultation. Relative to planning, the session will review software packages for report production and software for tracking time and expenses. Life care planning course work devotes little time to the basic business processes that affect the sustainability of a consulting practice. This session provides concrete information on the basics of starting, building, maintaining, and sustaining, a practice. Attendees will receive a workshop with sample retention contracts, accounting packages, overviews of life care planning software, business announcements, and malpractice insurance.

Saturday, April 24, 2010

8:00 am to 10:00 am

Part 2 — Ethics Practicum:

Developing and Maintaining the Ethics-Driven Practice

Susan Sheerin, RN, CLCP, MSCC

See Part 1 for details.

10:00 am to 10:15 am

Break

10:15 am to 12:15 pm

Using the Scientific Method

Keith Sofka

The rigor of the scientific method can lend much to the process of developing a Life Care Plan. For those without much exposure to the scientific method, this workshop will introduce the basic concepts of this method of thinking and link this method to the research and development of a sound and defensible Life Care Plan. For others, who have training in the scientific method, this course will help sharpen your understanding and establish new ways to use this information.

This session will teach the framework of the “scientific method” as an underpinning for conclusions drawn in a life care plan. This session will focus on teaching a concrete understanding of the scientific method, how scientific methods are used in a Care Planning process, the questions addressed in a Care Plan through use of the scientific method, and, how to investigate and disprove assumptions held by opposing experts. Planners will learn how to explain why specific data was collected, how to describe what was learned from the data, and how these conclusions led to selection of specific resources.

Vuelto a México - Vuelto

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Saturday, April 24, 2010 — Continued

12:15 pm to 2:15 pm

The Conceptual Framework for Life Care Planning

Penelope Caragonne, Ph.D., CLCP

The use of long-term planning in social work, nursing, public health, and vocational rehabilitation has a long history. Specific problems faced by persons with chronic conditions, multiple needs for services, and long periods of service with agencies resulted in development of this approach. Activities conducted sought to outcomes sought at both the individual and systems levels. For over 45 years, long-term planning has been well-established in the service approaches of many professional disciplines. Its use in litigation has been to establish monetary damages. The original rationale for long-term planning, its stages, and the methods associated with effective use of the approach are less well-communicated. Life care planning in litigation is often taught as a disability-specific approach for one person, an end in itself.

This session will teach the conceptual framework underlying long-term planning, its origins in nursing, social work, public health, and vocational rehabilitation; how it is different in each discipline, how it is similar; and what outcomes are commonly sought. Life care planning will be taught in distinct stages, the activities connected with completion of each stage, and a framework for evaluating good and bad practices in each stage. This session will teach procedures, techniques and outcomes sought from each stage, how each stage is reliant on work completed in the previous stage, and, how to critically analyze how well tasks are performed in each stage.

2:15 pm to 3:30 pm

Part 1 — Applying the Concepts:

The Quality Assurance Inventory (QAI)

Penelope Caragonne, Ph.D. & Julia A. Finn, BSN, RN, CCM, CLCP

The QAI is a questionnaire designed to support life care planners in objective analysis of life care plans. The QAI provides a structured way to analyze an expert's planning methods against standards denoting satisfactory completion of work. In the QAI, each stage of life care planning is operationally defined as to purpose, actions required to complete each stage and results sought. The process of plan development used by an expert can be analyzed with QAI, deficits identified, and inferences made as to the effect of deficits on plan validity and reliability. The QAI framework has been re-designed—and extensively edited—to provide a more easy-to-use method for evaluating how well a planner has developed a Care Plan. The evaluation framework taught in the proceeding section will be reviewed and refined within this section. Examples of poor—and exemplary—planning techniques will be used to illustrate the use of the framework. Students will be taught how to develop summary writeups that report deficits identified at each stage and will learn how to objectively apply the framework to reports they are asked to evaluate.

AN EMPHASIS ON CRITICAL THINKING AND PROBLEM-SOLVING:

The goal of the Second Leisure and Learn Workshop is to enhance critical thinking while practicing the skills of life care planning. Course content covers a wide range of skill areas, all applicable to functioning as an expert consultant.

Our hope is that participants will return home with renewed confidence about the challenges they face in their work—better able to

use critical skills to analyze how they work, how they can work with less stress, and how they can work with greater efficiency. Coursework is centered on learning activities which will increase understanding and application of skills in the following areas: application of the scientific method, and augmentation of reasoning, logic and problem-solving skills.

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Sunday, April 25, 2010

8:00 am to 10:00 am

***Part 3 — Ethics Practicum:
Developing and Maintaining the Ethics-Driven Practice***
Susan Sheerin, RN, CLCP, MSCC
See Part 1 for details.

10:00 am to 10:15 am

Break

10:15 am to 11:00 am

Part 2 — Applying the Concepts: The QA Framework
Penelope Caragonne, Ph.D., CLCP
See Part 1 for details.

11:00 am to 1:00 pm

***Applying Research Skills in Life Care Planning: The LCP as a
Reference Document***
Liz Holakiewicz, RN, BSN, CCM, CNLCP; Penelope Caragonne, Ph.D.,
CLCP

This session will teach a method for organizing and certifying information in a Life Care Plan. The approach is relevant because it can be used by solo practitioners operating without research staff, and, because it can provide a source of evidential support to a testifying expert. Questions which planners face in deposition relate to selection, efficacy, and outcomes obtained from use of different resources. In this class, students will be provided with methods to address these types of questions. The focus of this session is to provide life care planners with the means to defend methods they use in plan development, their selection of resources, and how they substantiated costs. The focus of this workshop is that of learning how to document and defend these choices.

Participants will be taught methods for organizing and fashioning a Care Plan so that it functions as a reference for questions raised at deposition or trial about any aspect of their plan. Students will learn to how to access on-line and proprietary databases for cost substantiation, how to cross-validate to verify assertions made in a plan or how to locate and cite peer-reviewed research to provide a proper foundation for conclusions drawn. This session will teach how to annotate and cite material to readily reference and retrieve information during testimony. Attendees will be taught how to sufficiently reference a document--records reviewed, actions taken, decision processes employed, and courses of action advocated--to create a fully transparent and replicable methodology. Material will be taught in a step-by-step fashion with practice exercises

WORKSHOP PRINCIPLES:

Three principles guide the development of our Leisure and Learn Workshop Series. Learning is most effective when it is conceptually sound, intensive and immediately applied. We feel that where we learn is also significant. Learning occurs most effectively when it takes place in a spacious, calm, distraction-free, and visually appealing environment.

Learning is also more readily integrated when combined with ample time for leisure activities.

Regardless of your experience as a life care planner, the Second Leisure and Learn Workshop will help you gain

valuable insights. These insights will lead you to new and more efficient ways to complete a Life Care Plan. To assure the transfer from classroom material to practical application, each workshop is designed to include hands-on opportunities to apply the information taught to real world problems. Class sizes are kept small to assure maximum interaction between faculty and attendees. The leisure aspect of this workshop assures frequent opportunities to talk with colleagues about the material being presented. Feel free to contact us if you have any questions.

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Sunday, April 25, 2010 — Continued

1:00 pm to 3:00 pm

Installing, Understanding and Learning How to Use the 2010 LCP Toolkit: a Collection of 3,000 Research, Assessment Tools, and “Live Links” for Life Care Planners

Penelope Caragonne, Ph.D. & Julia A. Finn, BSN, RN, CCM, CLCP

This "take-away" DVD will be given at no-cost for participants in the workshop. The Toolkit is designed around a very simple concept: a no-cost DVD that supplies research and assessment tools for better decision making is beneficial to life care planning experts, particularly those who operate in isolation from major universities. The Toolkit has been designed as an collection of reference materials to life care planners for their use in plan development. During the session, students will install the Toolkit on their laptop computers, gain familiarity with the information contained in the Toolkit, review applications of the Toolkit for their practice, and will be provided, after the workshop, with periodic updates of the Toolkit.

3:00 pm to 3:30 pm

Part 1 — Incorporating Assistive Technology in Your LCPs for People who are Non-Vocal, Hearing Impaired, Low Vision, Blind, Head Injured, and Spinal Cord Injured

Valerie Knafelc, SLP, CLCP & Keith Sofka

This two-part session will define the process of Assistive Technology (AT) service delivery, and how it is used with different disabling conditions. Presenters will explore the process of the AT assessment for different disabilities, outcomes sought, and how to implement recommendations made. This process will focus on identifying the perceived and actual obstacles which an individual with disabilities experiences. The concept of “functional obstacles” as opposed to “medical diagnoses” will be presented and each general type of functional obstacle – limits in movement, sensory (hearing and vision), communication and cognition – will be explored. Solutions for different types of functional obstacles will be described and a range of costs for each reviewed. Other key points will be presented including: the person centered assessment process, how to identify static or changing abilities, how to set priorities, how to complete a task analysis for AT, technology abandonment, the importance of motivation and tolerance in successful use of assistive technology, cognitive status as it affects use of technology, environmental factors and time lines for training in use of technology.

VACATION ATMOSPHERE:

Set on the shores of Lake Chapala, the Leisure and Learn Workshop offers the perfect combination of hard-work and unique recreational opportunities. Mornings and early afternoons are devoted to course content while the remainder of each day and evening are yours to enjoy. Come up to the mountains, away from the distractions of day-to-day life and experience the timeless wonders of a quiet Mexican village. Although Ajijic is up-to-date with wireless Internet, cell phone service and comfortable hotel rooms, it still retains its old world charm and friendliness.

None of the safety issues, so much in the news lately, have affected this haven in Mexico, so you can visit here in complete comfort and safety. Ajijic has a large expatriate community which expands the recreational options for residents and visitors alike.

As you wander the streets of Ajijic, you will find art galleries, craft and jewelry shops, fine restaurants and clubs along with the friendliest people you can imagine.

Ajijic is a village dating from the 16th century and has been home to American, English, Canadian ex-pats since the early 50's. Stroll on cobblestones to the lake, shop in the colorful village, dine at restaurants and people watch at the plaza. Bike, hike or horseback ride the roads and trails exploring this beautiful area. The village has many craft, art galleries, fine restaurants within walking distance, comfortable tapas bars, and a very wide selection of jewelry boutiques. Photography galleries are in abundance, as are cultural centers. Ajijic provides a serene and tranquil oasis in the midst of this quaint and romantic section of Mexico.

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Monday, April 26, 2010

8:00 am to 10:00 am

Part 4 — Ethics Practicum:

Developing and Maintaining the Ethics-Driven Practice

Susan Sheerin, RN, CLCP, MSCC

See Part 1 for details.

10:00 am to 10:15 am

Break

10:15 am to 12:45 pm

Part 2 — Incorporating Assistive Technology in Your LCPs

Valerie Knafelc, SLP, CLCP & Keith Sofka

See Part 1 for details.

12:45 pm to 3:45 pm

Managing and Controlling Deposition Testimony

Steven A. Adelman, Esq. & Kathryn Reid, MA, CRC, CCM

This critical three-hour session will help planners identify which aspects of deposition or trial testimony prove most difficult, and, learn strategies for over-coming these barriers. Planners will learn how to circumvent or overcome the stresses inherent in a deposition. Planners will learn ways to reduce time spent in deposition and will learn methods to control the pace and flow of a deposition. This workshop will allow planners to understand—from a practicing attorney and an experienced life care planner—techniques and strategies used by attorneys to confound and confuse witnesses, and how to respond to these tactics.

AFTER COMPLETING THE WORKSHOP, PLANNERS WILL KNOW:

How can a plan developed for litigation meet both the needs of a referring client and needs of a disabled person?

What types of business models exist for an expert practice and how do technology purchases support each type of business model? What types of contracts, retainer agreements, and collection practices need to be used by an expert consultant?

What activities are essential to building an adequate foundation for expert testimony regarding a life care plan?

What are effective methods for evaluating an opposing expert's life care plan, and what aspects highlight key deficiencies in the life care planner's methods?

What are the hallmarks of inadequate planning when including assistive technology (AT) in a life care plan? What factors lead to "technology abandonment?" What on-line databases describe user experiences with AT?

What are three on-line data bases to use to validate costs of inpatient hospitalizations, inpatient surgical procedures, and outpatient visits and procedures? How is the data collected for each, what are the data sources, and how frequently is data updated? How can an expert's recommendation for outdated or no longer available technology be proven?

What are efficient strategies for effective medical record analysis? What are the advantages of using a Methodology

section in a life care plan? How can a life care plan be organized to ensure accurate and rapid recall of information during a deposition?

What is a widely used and empirically sound method for calculating levels of attendant support needed by an individual? What four factors determine whether a person needs a low, high or moderate level of case management?

What three factors dictate the frequency of life time psychological supports a person needs?

How many geographic moves lifetime should be considered when predicting costs for architectural renovation?

What on-line data base provides this information and how can it be used? What client factors need to be considered to determine costs of proposed architectural modifications?

What are the direct and indirect costs associated with family vs agency-based hiring of care? What is the probability of abuse or neglect of persons with disabilities, and, when is it necessary to include costs for employee background checks, bonding, insurance, employee screening, and random drug checks for client and family protection?

What are the direct benefits of Supported Employment? What are the psychological benefits of day programming or community integration supports, as opposed to recommending only daily attendant support lifetime?

Questions? Write to mail@caragonne.com or call 866-285-0665.