



**CARAGONNE + ASSOCIATES, LLC**

***Announce the  
Fourth Leisure and Learn Workshop  
Ajijic, Jalisco, MX  
March 14 - 17, 2013***



The Leisure and Learn Workshop is based on three principles.

Learning is most effective when instruction is “one-to-one,” intensive, immediately applied, and of practical value.

Where a person learns is just as important as how they learn. Settings that are serene, spacious, free from noise and everyday distractions, also contribute to acquiring new information.

Leisure is also an important component to efficient learning--time devoted away from class to novel sights, new activities, exploring unusual surroundings, and fostering relationships with new colleagues.

The Leisure and Learn Workshop has been designed around these principles. Its dates are March 14, 2013 through March 17, 2013. As before, the location for the workshop is in Ajijic, a small village high in the central mountains of old Mexico. Registration is limited to permit ample time for “one-to-one” support and direct application of the research and analytic skills taught. Instruction is didactic, dialectic, and, self-paced.

The teaching venue is peaceful, with ample space and up-to-date technology. The property is equipped with high speed internet and Wi-fi throughout the property. The setting includes scanners, a range of office technology and (800) toll-free lines to the US. It offers a sheltered, distraction-free setting for students. Classes will run daily from 8:00 - 2:00.



Lake Chapala lies in a valley surrounded by the Sierra Madre Mountains of southwestern Mexico and is the country's largest natural lake. Once an enormous inland "sea," Lake Chapala is known for its breathtaking beauty, geothermal hot springs, and ideal climate--described by National Geographic magazine as "among the best in the world."



Ajjic (Ah-hee-heek) has all the normal services of the 21<sup>st</sup> century-- water treatment plants, electricity, paved streets, cellular phones, and the internet. But when you first arrive, what you see is the mystery and charm of a 16th century village.

Restaurants buy mesquite firewood for their grills from a local farmer, who delivers it on his donkeys. Cows and horses graze along the lake. Maiz is grown everywhere, to be made into corn tortillas, a staple of the Mexican diet.



The narrow cobblestone streets are reminiscent of old Europe. When you drive with your car windows open, you can hear the clip-clop of horses' hooves. Just around the corner you may see a caballero riding to work on his horse, a common sight in the village. Still further, a street vendor sells roasted corn or "pozole," a form of corn soup. High-walled homes reside next to a "herraduria," a local ironwork shop.



Flowering trees paint the area with riotous color. Fruit is so plentiful one can pluck the fruit off the trees while strolling along the village streets. Ajjic's streets are shared by vehicles, bicycles, burros, horses, and pedestrians. Spectacular gardens hide behind carved wooden gates and colorful walls.



Golf, tennis, swimming, and horseback riding are all available. One can relax in the San Juan Cosala "balnearios" (swimming areas offering thermal spring water), or, visit the jewelry, fabric, art, and clothing stores that line the streets. Modest family-owned "restaurantes" thrive beside high end supper clubs.

Massage and esthetic services are available. On-site services from a range of trained aestheticians can also be secured. Early morning group exercise classes meet tri-weekly on the grounds of the Lake Chapala Society. Explorations of the local open-air markets in Chapala, Jocotepec, and Ajjic can be made. Sunset boat trips on the "Batur" traverse the width of Lake Chapala across to the small fishing village of San Nicholas.





Over seventy local restaurants--French, Mexican, Spanish, Greek, Japanese, Japanese, Argentine, Chinese, Italian, and Slovakian--offer a variety of cuisines.



The Lakeside Little Theatre and Music Appreciation Society hold events the week of the conference. Other music productions will also be held: the Music Appreciation Society, sponsoring The Bandaras Bay Jazz All-Stars concert, the Los Cantantes del Lago presenting 'The World Beloved' a Bluegrass Mass, and the Northern Lights Music Festival. Cruz Roja's annual Taste of Ajijic and the Ajijic Art Festival will occur.



Forays to other outlying villages--Tequila, Tapalpa, and Mazamitla--can be scheduled. A trip to Guadalajara and Tlaquepaque--the artisan center of the state of Jalisco--is planned for the afternoon and evening of March 17<sup>th</sup>. The tour will be followed by a reception and six course "cena" at Quinta Don Jose, one of Guadalajara's finest restaurants. Located in the heart of the artisan district. Quinta don Jose also ranks as the highest rated "B and B" in both Guadalajara and Tlaquepaque.



Participants can enjoy the area's tiny shops, street markets, galleries, and workshops. Antiques, masks, furniture, tapestries, glassware, lamps, wrought-iron furniture, jewelry, pottery, and artifacts of all types are sold. In fact, fact, the Lake Chapala area is fast becoming the region's supplier of quality crafts.



Lakeside, also nicknamed the "Chapala Riviera," is also home to a large international community....a mix of native Mexicans, Americans, Canadians and foreigners from other countries throughout the world. Ajijic lies in the heart of Lakeside, and is known for its retired artists, writers and showbiz personalities.





**WORKSHOP FOCUS** The Workshop is designed to enhance the capabilities of life care planners to use critical thinking, logic, reasoning and problem-solving in their work. This workshop was created for beginning and advanced life care planners alike.

The Workshop will hone skills in basic plan analysis and research. You'll learn how to develop, produce, and organize a Life Care Plan. You will acquire evidence-based methods that support appropriate use and integration of on-line peer-reviewed literature in your life care plans.

You will learn how to identify and critique peer-reviewed medical research and integrate your findings in your plan to support your recommendations. Instruction will be given in how to search, cite your research as foundational support for LCP recommendations and conclusions. We'll include information on evaluating and choosing assistive technology. You will also learn how to substantiate your cost data using research findings.

### **The Automated Form Set For Data Collection and Decision-Making in Life Care Planning**

Participants will receive training in use of a comprehensive set of automated protocols for data collection and decision-making in life care planning. The protocols, provided at no cost to participants, document each stage of the planning process and provide the evidential basis for decisions made regarding hours of Case Management and exact hours of attendant support needed per year, and, determine long-term costs to a family

when choosing self vs. agency hiring practices. Other protocols provide a numeric framework through which life care plans can be evaluated using a 100 point scale, while others document aspects of existing housing which must be modified for access. Still others can be used to document skills in Activities of Daily Living.

Participants will learn about the American Association of Nurse Life Care Planning Standards of Practice (CNLCP) and the Certified Life Care Planner (CLCP) Standards and Guidelines frameworks. These will help you understand the work product from each. You will be able to apply these to critique an actual Life

### **The American Association of Nurse Life Care Planning (CNLCP) and the Certified Life Care Planner (CLCP) Standards of Practice**

Care Plan. .

### **Enhance Expert Capabilities in Analysis, Evaluation, Logic, and Productivity**

Finally, we'll have the latest on choosing up-to-date office technology to decrease your costs and increase your productivity.

At the end of the workshop, participants will be able to:

Identify assumptions, bias, and speculation in a life care plan and expert testimony.

Analyze logic, beliefs, concepts, arguments, and premises by testing them against relevant life care planning standards.

Evaluate information for accuracy, relevance, precision, and significance.

## **“Red Flags” in Life Care Planning, Evidence-Based Planning, Cost Substantiation Methods, Analysis and Critique of Peer-Reviewed Research**

Understand the value of interdisciplinary collaboration with the treatment team, school personnel, attorneys, economists, and others.

Identify “Red Flags” that indicate unreliable and invalid methods of plan development.

Identify the purpose, use, and outcomes desired from a model of evidence-based planning

Search and identify peer-reviewed research that support or disprove LCP recommendations.

Learn and apply qualitative and quantitative cost substantiation methods.

Critically evaluate and select appropriate assistive technology for persons with mobility impairments and impairments due to head injury.

Evaluate and select office technology to increase productivity and reduce administrative costs inherent to owning a litigation consulting firm.

Independently calculate “embedded formulas” using WordPerfect or Mac software to ensure the accuracy of sums shown in each section of a Cost Chart.

## **SCHEDULE OF EVENTS**

**Session One: Understanding Current Standards for CNLCP and CLCP Certifications** *Shelly Kinney, MS RN CCM CNLCP and Penelope Caragonne, MS PhD CLCP.* Learn the framework for each certification and how to evaluate a plan from either discipline for adherence to, or deviation from, accepted standards of practice.

**Session Two: Evaluating Life Care Plans** *Penelope Caragonne, MS PhD CLCP.* Based on “Evaluating the Work of Life Care Planners: The Red Flag Concept” published in *Determining Economic Damages*, this workshop will teach how to develop a comprehensive, objective, and substantive report regarding an expert’s work using either CLCP and AANLCP Standards and Guidelines. The workshop will address: the eight most common features of sub-standard life care planning; characteristics of superficial medical record review; deficient or “token” medical collaboration; poorly executed Cost Charts; hallmarks of a poorly developed foundation for opinions; why the dimensions of consistency, validity, reliability and transparency are important. Questions a LCP should address for the disabled person, attorneys, economists, and the court system will also be taught. Redacted life care plans will be provided as case illustrations.

**Session Three: Evidence-based Life Care Planning: Theory into Practice.** *Judy Metekingi, BSN RN MN CRRN CDMS CCM LNCC CLCP* An in-depth exploration of the rationale and

methods for evidence-based planning, its use in litigation, and how to avoid the pitfalls of presenting a plan without supporting peer-reviewed evidence.

**Session Four: Bridging the Great Divide: Creating Pain-Free Interactions Between You and Same-Side Forensic Economists.** *Dwight Steward, MS PhD EmployStats.*

[www.employstats.com](http://www.employstats.com) Dr. Dwight Steward is an expert in statistical and economic analysis of labor and employment related issues. He has experience in consulting and litigation involving employment discrimination and wage and hour matters —on behalf of both defendants and plaintiffs. Dr. Steward has also developed and implemented innovative methodologies to assist attorneys in the assessment of economic damages in cases involving death or catastrophic injury. Forensic economics in life care planning has changed in the last 15 years. Learn what you need to know for effective collaboration with same-side economic experts: Their methods and frameworks, what materials they need, how to tailor your life care plans to help them, and common thorny issues you may encounter with same-side experts. We'll also discuss effective marketing to forensic experts.

**Session Five: Medical Cost Projections and Life Care Plans.** Panel Discussion, led by participants with backgrounds in production of both work products. To refine the working definitions of these two very different products, we'll examine their similarities and differences: methodology, data collection, collaboration, time frame, and report format.

**Session Six: Your Cost- and Time-Effective Office.** *Keith Sofka, ATP (Ret)* This session will have information on automation, computer software, digital cameras and their use, scanners, and other cost-effective technology relevant to your practice. Emphasis will be placed on learning how to select hardware and software to create a cost-effective portable office to suit your needs.

**Session Seven: International Life Care Planning: Methods, Processes, and Outcomes.**

*Penelope Caragonne, MS PhD CLCP and Keith Sofka, ATP (Ret).* When and if to accept a referral for international life care planning. This session will cover: what's required when life care planners are asked to plan for care in a foreign country, how a country's wealth and policies affect data collection, how to research available services, available qualitative and quantitative cost data bases, country-specific cost research, working with a foreign currency, how to present comparative cost data in your report, use of graphics in your report, and what types of deposition questions you can expect.

**Session Eight: Medicare Set-Asides.** *Alicia Cornetto, MSN CLCP.* This is a two-part workshop session. In the first two-hour session, participants will discover the difference between Life Care Planning and Medicare Set Asides. Participants will also be divided into groups and given all of the case details and tools to develop a Medicare Set Aside from start to finish including the following tasks: how to develop the chronology portion of the MSA, determining the current treatment regimen, projected future treatment, translating the treatment into appropriate codes, pricing future treatment, methods of funding the MSA, and methods to administer the MSA. One member from each group will present the MSA. Differences and similarities between and among various MSAs will be reviewed as will primary differences between MSAs and LCPs. How to add MSAs to your practice will be covered. In the second two-hour session, Section Two covers the SMART Act and future legislation proposed. This section also covers the role of legislation, proposed rules for handling future medical in Liability settlements: full exhaustion of settlement benefits on medical care, written decision not to pursue if an array of factors are met, written attestation from treating physician indicating no additional medical care is required, or, MSAs submitted for review and approval. Section Three of this workshop will review three sets of recovery options: recovery options currently in place, upfront payment to Medicare, or,

beneficiaries obtain a compromise or waiver of recover. Participants will also discuss implications to the practice of Life Care Planning.

**Session Nine: How to Prescribe and Critique Assistive Technology in Life Care Plans.**

*Keith Sofka, ATP (Ret) and Penelope Caragonne, MS PhD CLCP.* Assistive technology for persons with disabilities: What factors and standards govern its use, appropriate stages for prescription of assistive technology, how a task analysis supports an evidence-based recommendation for technology, avoiding errors or omissions, and how to evaluate technology recommendations in an opposing expert's plan. Please bring a sample of an assistive technology prescription from a life care plan you have reviewed.

**Session Ten: Current Status of the Affordable Care Act.** *Julia Finn, BSN, RN, CCM, CLCP.*

The status of the Affordable Care Act (ACA) for 2012, 2013, 2014 and beyond. State insurance exchanges, partial benefits from elimination of the "donut hole," key ACA provisions now in operation, number of persons affected by these provisions, ACA features scheduled for 2013 and 2014, and how the ACA may (and may not) affect life care planning.

**Session Eleven: Mentors for Life Care Planners.** *Shelly Kinney, MN RN CCM CNLCP and Penelope Caragonne, MS PhD CLCP.*

What informational and support do new life care planners need? Actions are underway under the aegis of the International Association of Rehabilitation Professionals and the American Association of Nurse Life Care Planners to help. We'll identify types of mentoring new planners need and want, learn what types of mentoring even seasoned professionals are requesting, compare the IARP and AANLCP mentoring programs, define gaps between educational offerings for novices and what experts later need as testifying experts, help you identify what information and experiences you should seek, and look at realistic expectations and sources for mentoring.

**Session Twelve: How to Embed Cost Calculations in Life Care Plan Cost Charts.** *Keith Sofka, ATP (Ret) and Wendi Howland, MN RN-BC CRRN CCM CNLCP LNCC*

Tired of checking and rechecking your arithmetic calculations in life care plans only to find a mistake during your deposition? Learn how to use standard available Apple and WordPerfect software to add, subtract, multiply and divide cost values in a Cost Chart embedded in your report. Please have the applicable software on your laptop when you arrive. (PC: WordPerfect; Mac: iWorks) We'll provide some samples to practice your new skills!

**Session Thirteen: The Automated Life Care Planning Form Set.** *Keith Sofka ATP (Ret) and Penelope Caragonne MS PhD CLCP.*

Receive training in how to use a comprehensive set of automated life care protocols for data collection and decision-making automated for use on a PC or MAC. The sixteen (16) forms are given at no cost to participants. Documenting decisions made at each stage of life care planning process, they provide evidence for a range of plan recommendations. The forms include: assigning a level of Case Management to a person, hours of attendant support and in what areas, a way to compare long-term costs self vs. agency hiring for attendants. A form evaluating the quality of life care plans using a 100 point numeric scale will be taught, as will others representing the range of areas requiring decision-making in life care planning: documenting areas of housing that need modification for access, types of transportation modifications, or a scale that documents skills in Activities of Daily Living. Participants will, using a redacted case, fill out a selection of forms.

**Session Fourteen: The Life Care Planning Toolkit.** *Susan Sheerin RN MSN CLCP and Penelope Caragonne MS PhD CLCP and Keith Sofka ATP (Ret)* Many life care planners operate solo expert practices. Operating in isolation from major universities, they often have limited

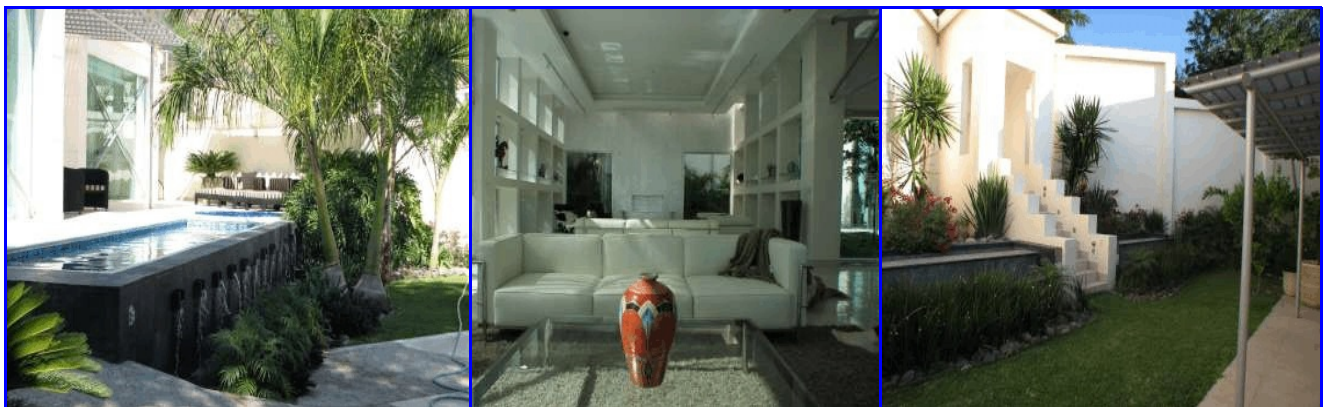
access to the array of research resources available through a major teaching facility. This DVD is designed for those life care planners. It is organized around a very simple concept: life care planners would be aided with ready access to an array of reference materials that encompass the range of disabling conditions their plans represent. Planners also need research that supports recommendations they will later defend in deposition. Continually updated for currency, the Toolkit contains over 4,000 current studies and links to government databases on disability, surgical costs, labor statistics, and life expectancy. Classic references in disability and life care planning are also included. Students will install the Toolkit on their laptop computers, be familiar with the information in the Toolkit, and conduct “live” searches for research using the Toolkit.

**WORKSHOP VENUE** The workshop venue is designed to offer tranquility and seclusion. Although in the heart of a busy Mexican village, the compound’s walls and fountains mask ambient noise and enhance concentration. Participants are strongly advised to bring a portable laptop, if available, for use in group and individual on-line research activities; a few computers will be available for those who need them. On breaks, you can maintain contact with your US office with a free Vonage connection.

Complimentary coffee and a full breakfast is served each morning at 7:30 A.M. A light lunch is also provided. Any type of aesthetic service can be arranged on-site. After 2:00, when the workshop is over for the day, the surrounding area offers hikes to the mountains, water aerobics, boat trips, kayak rental, walk-about through the village, visits to local art galleries, jewelry stores, clothing stores, attending painting classes, visits to the hot baths in San Juan Cosala, swimming, or just relaxing and networking with new colleagues.

**REGISTRATION AND WORKSHOP INFORMATION** For information on previous conference formats, presenters, outcomes, and lodging, please go to [www.caragonne.com](http://www.caragonne.com). Questions about payment, airlines, dress code, hotels, taxis from the airport? Call Caragonne and Associates with any questions you have (toll-free 866-285-0665 in Mexico) or email us at Caragonne and Associates, [mail@caragonne.com](mailto:mail@caragonne.com). After you register, you’ll receive a list of hotels, PDF maps and detailed directions from the airport to your hotel or B&B and the workshop before the conference. Taxis are plentiful and inexpensive. We’ll also send you a general overview of Ajijic, physicians and pharmacies, and a comprehensive listing of all restaurants, art galleries, shops, and clothing stores in Ajijic.

**AIR TRAVEL** Major air carriers such as United, Volaris, Alaska Air, American, Mexicana, Delta and Aeromexico fly into Guadalajara (GDL). You will need a current passport.





**I. ATTENDEE INFORMATION - Please use ink and print clearly**

First Name:

Last Name:

Certifications:

Organization:

Address:

City:

State:

Zip:

Telephone:

Fax:

E-Mail:

**II. REGISTRATION FEES – Please complete one form per person.**

- |  |                   |
|--|-------------------|
| <input type="checkbox"/> I will be Attending the Workshop and Opening Reception –<br>from 6:00 P.M., Wed., March 13 <sup>th</sup> thru Sun., 2pm, March 17 <sup>th</sup><br>All attendees and significant others are invited to the opening reception. | <b>\$700.00</b>   |
| <input type="checkbox"/> My Significant Other will be attending the Opening Reception  | <b>\$0.00</b>     |
| <input type="checkbox"/> I will be Attending the Workshop – from 8am, Thur., March 14 <sup>th</sup> thru 2pm, Sun., March 17 <sup>th</sup>   | <b>\$700.00</b>   |
| <input type="checkbox"/> Members in good-standing of IARP and AANLCP will receive a \$100.00 discount.   | <b>(\$100.00)</b> |

An overnight trip will be available to the artist's town of Tlaquepaque. The trip will begin on Sunday, March 17<sup>th</sup> after class. Accommodations will be at the beautiful Quinta Don Jose, transportation from Ajijic to Quinta Don Jose and on to the airport will be included. Final cost for this trip will depend upon the number of participants.

- |  |                              |
|--|------------------------------|
| <input type="checkbox"/> I am interested in Attending the optional trip to Tlaquepaque<br>starting the afternoon of March 17 <sup>th</sup> – | <b>Cost To Be Determined</b> |
|--|------------------------------|

**Total Cost of Workshop:**

- |  |
|--|
| <input type="checkbox"/> \$700.00 Workshop Non IARP or AANLCP Member                           |
| <input type="checkbox"/> \$600.00 Workshop IARP or AANLCP Member                               |
| <input type="checkbox"/> Optional Trip to Guadalajara Transportation – Costs to be determined. |

**III. PAYMENT – (Please do not enclose any payment.)**

**Please do not enclose any payment. When we receive your registration, we'll send you a bill via your e-mail address. This will be payable through Paypal or any major credit card. Please call if you would prefer other arrangements.**

**IV. ADDITIONAL INFORMATION**

Special Needs:

***An information packet will be sent to you via e-mail prior to the close of registration. This packet will include additional information about after Workshop activities, maps, directions for travel from the airport to your hotel, etc. If you would like assistance with lodging, flights or other logistics, please call Caragonne and Associates, LLC at 866-285-0665.***

***Please complete your registration by February 15, 2013.***

***Please return this form by e-mail to [mail@caragonne.com](mailto:mail@caragonne.com) or Fax this form to 312-803-2299 or mail this form to Penelope Caragonne, PhD., 827 Union Pacific Blvd., 071388, Laredo, TX 78045***

*Questions? Please call 866-285-0665 or send e-mail to: [mail@caragonne.com](mailto:mail@caragonne.com)*