

## *The 2016 International Leisure and Learn Workshop*

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### Collaboration: The Essence of Effective Life Care Planning Meet The 2016 Distinguished Faculty

Rick Robinson, Ph.D., MBA. **KEYNOTE ADDRESS: VOCATIONAL ISSUES IN LIFE CARE PLANNING: HOW SHOULD VOCATIONAL RECOMMENDATIONS BE UNDERSTOOD AND ACCOUNTED FOR DURING DEVELOPMENT AND IMPLEMENTATION OF A LIFE CARE PLAN.**



Dr. Robinson specialized in Vocational & Disability appraisals, Loss of Earning Capacity assessments, Life Care Planning and Vocational Evaluations. He is a prolific author and co-author of numerous articles, chapters and comprehensive texts on vocational rehabilitation. The following listings of articles, book chapters and books were published between 2009 and 2013. The Foundations of Vocational Rehabilitation, published by Springer Publishing. Dr. Robinson has also co-authored the following book chapters and articles: Content Analysis of Factors Identified in Vocational Evaluation Analysis Reports, Proposed Application of the Delphi Method For Expert Consensus Building within Forensic Rehabilitation Research: A Literature Review, Future Work Propensity: A Proposed Alternative to Purely Statistical Models of Work-Life Expectancy, Identification of Core Variables to be Considered in an Assessment of Vocational

Earning Capacity in a Legal-forensic Setting: a Delphi Study, The Vocational and Rehabilitation Assessment Model (VRAM): Introduction of an Empirically Derived Model of Forensic Vocational and Rehabilitation Assessment, a Survey of the Perception of Research Priorities among Private Rehabilitation Practitioners, 30 Years of Rehabilitation Forensics: Inclusion of Occupational and Labor Market Information Competencies in Earning Capacity Models, Vocational Rehabilitation Process and Work Life, Introduction to Vocational Rehabilitation, Forensic Rehabilitation and Vocational Earning Capacity Models, Psychometric Assessment in Forensic Vocational Rehabilitation, Consultation in Civil Injury Rehabilitation, and Worklife Expectancy Models and Concepts.

John Berg, BS, MeD. **EXPERT CONSULTATION: A TO Z.**



John is the owner of Vocational Consulting, Inc., in Seattle, WA. John is a Certified Rehabilitation Counselor, a Certified Disability Management Specialist and a Board Certified Diplomate through the American Board of Vocational Experts. He has practiced as a forensic consultant for 38 plus years. He is the recipient of the following awards from his peers: Presidential Citation: Communication/ Technology Chair, American Board of Vocational Experts, March 20, 2015. Outstanding contribution to the mentoring program. David S. Frank, "Lifetime Achievement Award", American Board of Vocational Experts April 2013 voted by membership at Spring conference, Scottsdale, AZ. Presidential Citation; Communication/Technology Chair, ABVE 2010-2013. Past forensic chair, 2004-2005 International Association of Rehabilitation Professionals, Elected Credentials Chair, American Board of Vocational Experts, 2014-2016 term, Director at Large, American Board of Vocational Experts. Second term for April 2013-2016.

Elected, Board Member, American Rehabilitation & Economic Association (AREA) 2011-2013, Outstanding Service Award, International Association of Rehabilitation Professionals, 2003-2006 Chair of Forensic Board. He is the author and co-author of the following book chapters and articles: Senior Mobilization: needs and services analysis of those age 65 and

older in multiple SW and SE Counties of IDAHO; Evaluating Workers Compensation Claims for Permanent & Total Disability; Utilization of Labor Market Research & Employer Sampling by Vocational Experts. Evidence Based Vocational Analysis -"A solution to the soft science problem."

Paulette Freeman, CRC, Co-Presenter. **EXEMPLARS OF WORK IN VOCATIONAL REHABILITATION.**



Paulette is a Vocational Rehabilitation Counselor and specializes in Worker's Compensation. She also volunteers in organizations working against Domestic Abuse and Breast Cancer. She works with Habitat for Humanity and multiple charity organizations. Paulette Freeman was given the first Bart Hultine Altruism Fund (BHAF) annual award and stipend for her exemplary dedication and outstanding contributions to the field of vocational rehabilitation. BHAF is an established non-profit organization founded in the memory and honor of Dr. Barton W. Hultine. Mrs. Freeman maintains her private practice, Resolutions!, Inc, in Papillion, Nebraska and has worked the field of rehabilitation as a teacher, counselor and respected expert for the past 27 years. She is a fighter for what she believes in and is not afraid to stick her neck out and say "why can't we do that?" She has facilitated the Nebraska Chapter's efforts to become recognized for their State IARP conferences with the speakers she has recruited and she is recognized on the IARP National level for the volunteer work and coordination she does in assisting with fundraising. Paula's focus is always on what is in the best interest of her client. She conceptualizes with them and assists them in realizing their potential and ultimately their dreams. She focuses on personal relationships that she fosters and tempers: continually moving towards an agreed upon outcome. Paula values her relationships with her colleagues and gains great strength from the dynamics the close knit world of rehab professionals offer in terms of support and professional growth.

Robin Cook Pyle, PhD. Co-Presenter. **EXEMPLARS OF WORK IN VOCATIONAL REHABILITATION.**



Dr. Cook is a self-employed vocational consultant in Denver, CO. She has worked with individuals with disabilities or barriers to employment since 1987 and specifically in vocational rehabilitation since 1994. Her practice (Disability and Workforce Consulting, LLC) has encompassed a number of areas. These include direct service provision to persons receiving long-term disability, Ticket to Work, OWCP or other benefits as well as forensic testimony related to Social Security disability claims, FELA, Workers' Compensation, personal injury, and domestic/family law cases. She provides services for industry such as job analysis, recommendations regarding reasonable accommodations under the Americans with Disabilities Act, labor market surveys and program evaluation. Dr. Cook received her Ph.D in Rehabilitation Services from Auburn University in 1998. She has been a Certified Rehabilitation Counselor (CRC) since 2000 and a Registered Professional Vocational Evaluator (PVE) since 2011. Dr.

Cook is or has been designated as a Qualified Rehabilitation Provider (QRP) and/or vendor with the Workers' Compensation courts in four states, as well as a contracted Social Security Administration Vocational Expert since 2005.

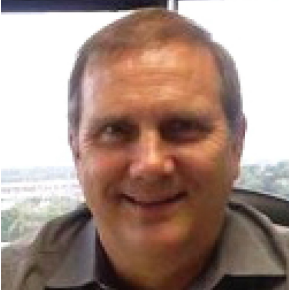
Julia A. Finn, BS, RN, CLCP. **WILL REFERENCE TO INSURANCE RESOURCES AFFECT THE COST RESEARCH YOU CONDUCT AND THE COST CHARTS YOU DEVELOP?**



Ms. Finn is a Certified Life Care Planner through the International Commission on Health Care Certification, a Certified Case Manager through the Commission for Case Management Certification, a currently licensed Registered Nurse in Ohio and Indiana. She received her BSN from Indiana Wesleyan University and her Para Legal Certificate, Life Care Planning Certificate from Capital University Law School. Ms. Finn is the managing principal of Comprehensive Life Care Planning, LLC, providing life care planning, medical cost projections, case management, medical/legal, managed care, workers compensation, and case management consulting, as well as training services to organizations and individuals. Ms. Finn has extensive insurance industry experience in a variety of payer source arenas including HMO/PPO/HSA, ERISA/ self insured, Medicare Special Needs Plan, Medicaid Managed Care, as well as State and Federal Worker's Compensation. Ms. Finn has presented regionally, nationally, and internationally on a variety of

topics related to Life Care Planning, Case Management, and Managed Care. She is also a network manager for Paradigm Management Services. Her clinical experience includes acute adult, pediatric, and neonatal critical care.

Allyn Needham, Ph.D., CEA. **COLLABORATION WITH FORENSIC ECONOMISTS: UNDERSTANDING THEIR WORK AND THE ROLES THEY PLAY IN CIVIL LITIGATION.**



Dr. Needham is the co-owner of Shipp, Needham, and Durham in Fort Worth, TX. He is active in several national economic associations and testifies on widely on forensic matters. He has served as President of the American Economic Rehabilitation Association and the Southwestern Society of Economics. He has published articles in the area of financial economics and forensic economics and is a Certified Earnings Analyst.

Craig Logsden, Esq. JD., Partner, The Snell and Wilmer Law Firm, Phoenix, AZ. **The Role of a Life Care Planner in a Defense Case.**



Mr. Logsden is a trial lawyer whose practice focuses on the healthcare industry, product liability, insurance coverage and criminal defense. He has extensive experience representing automotive and recreational boat companies and litigating complex criminal cases. He graduated Cum Laude with a Juris Doctor in law from Arizona State University and his Bachelors degree in Journalism from the University of Oklahoma. Mr. Logsden is active in the following organizations: State Bar of Arizona American Bar Association Maricopa County Bar Association Arizona Association of Defense Counsel Homeless Legal Assistance Project Member of committee to establish veteran courts in Maricopa County, Arizona, dedicated to current and former members of military Leads Snell & Wilmer's partnership with inner-city elementary school

**PANEL: A COMPARISON OF THE BENEFITS AND DRAWBACKS OF SIX METHODS OF COST RESEARCH.**



Joan Schofield, RN, BSN, MBA, CNLCP, is Past President, American Association of Nurse Life Care Planners. Her areas of clinical nursing experience and area of practice are Catastrophic injury case management and Pediatric and adult critical care. Her practice in life care planning and case management is located in Albuquerque, NM.



Shelly Kinney, MSN, RN, CCM, CNLCP, is a Registered Nurse with over 20 years of experience in a variety of inpatient health care settings, Nurse Case Management, and Life Care Planning. Her independent consulting company, Kinney Consulting, Inc provides case management services in Nebraska and surrounding states for worker's compensation insurance carriers, disability management companies, and private individuals. Life Care Planning services are available nationwide. Shelly has special expertise working with individuals who have experienced multiple trauma/catastrophic injury, traumatic brain injury, those with acute medical rehabilitation needs and individuals with complex medical problems such as chronic pain. Her specialties are Life Care Planning, Medical Case Management, and Catastrophic Case Management.



Susan U. Sheerin. RN, CLCP, MSCC, CGCM, owns Life Care Planning Solutions in Scott Township, PA. Susan holds speciality certification in life care planning, geriatric life care planning and Medicaid Set-Asides. She has particular expertise in interpreting the Center for Medicare Services cost database.



Ruth Brubaker Rimmer; **PARTS 1 AND 2: EXPERT COLLABORATION FOR A PEDIATRIC BURN SURVIVOR.**



Dr. Ruth Brubaker Rimmer is a pre-eminent national specialist in the effect of traumatizing burn injuries for individuals. She has worked at the Arizona Burn Center for over 15 years and has authored multiple research articles, book chapters and curricula on the stages, steps and outcomes of appropriate burn intervention. She is also the author of several curricula on burn treatment intervention. Dr. Brubaker is now in private practice and provides life care planning services in a forensic context. She is the owner of Life Care Plans for Life. She has worked with the families of, and children with, burns for over past 22 years.

#### **Cost Research Strategies using AHD/HCUP/Med Fees.**



Liz Holakiewicz RN, BSN, CCM, CNLCP, Holakiewicz and Associates, San Diego, CA. Liz is a very experienced forensic consultant and life care planner. Her sub-specialty is pediatric life care planning. Liz also currently accepts cases from the federal government in vaccine-related injuries.

**PANEL: WHEN YOU JUST CAN'T COLLABORATE.** Shelly Kinney (See above for photo), Alisa Cornetto and Kathryn Reid.



Ms. Cornetto holds a Bachelors of Nursing degree and is a certified Medicare-Set-Aside Consultant. Ms. Cornetto is the owner and proprietor of Concierge Medical Consulting and Risk Consultants. She was also appointed as a Board Member of the entity that certifies persons as Medicare Set-Aside Consultants for the International Commission on Health Care Certification. She also consults nationally in the forensic specialty of life care planning and as well, is the Risk Manager for Orange County Government in Hillsborough, NC.



Ms. Kathryn Reed is a Rehabilitation Counselor, Case Manager and Life Care Planner at Reid Case Management, Inc, Seattle, WA. She was awarded the status of Fellow of International Academy of Life Care Planning by the Foundation for Life Care Planning. She has owned her company for the preceding 14 years. She received her Masters in Rehabilitation at Seattle University in 1985. Ms. Reid belongs to the following organizations: Commission on Rehabilitation Counselor Certification (CCRC), American Board of Disability Analysts (ABDA), Washington Medical Case Management Association (WMCMA), Northwest Neuropsychological Society (PNNS), and ROOTS Young Adult Shelter. She holds expertise in the following areas: Rehabilitation, Vocational Rehabilitation, Traumatic Brain Injury, Case Management, and Workers Compensation.



**PANEL MODERATOR.** Penelope Caragonne, MSW, Ph.D, CLCP. Dr. Caragonne is co-owner of Caragonne and Associates, LLC a litigation consulting firm located in Ajijic, Jalisco, MX. She has functioned as a social worker/case manager since 1968, receiving both her masters and doctoral degrees in Social Work. Dr. Caragonne was awarded her doctoral degree in Social Work in 1981. She functioned as principal investigator and project director at the University of Texas/Austin for one statewide and one national survey funded by the Office of Human Development Services which evaluated the role of case managers in twenty-two social service settings. She also functioned as principal investigator and project director, with on-going funding from the National Institute for Disability and Rehabilitation Research to study, evaluate, and increase the state-wide capacity of educators, independent living personnel and public social service providers in Connecticut to provide assistive technology services to persons with

disabilities. Dr. Caragonne founded the first independent living center in New Haven, CT. Since entering the field of litigation consulting in 1991, she has written over fifteen peer-reviewed articles on various aspects of litigation. She was recently asked to serve as a Commissioner on the Board of Directors for the Certified Life Care Planner Credential offered through the International Commission on Health Care Certification. Dr. Caragonne is a member of International Association of Rehabilitation Professionals/International Academy of Life Care Planning, National Association of Social Workers, and the American Association of Nurse Life Care Planners. Dr. Caragonne operates Caragonne and Associates, LLC with her husband and business partner, Keith Sofka, a retired assistive technology provider. They have designed and held the Leisure and Learn Conferences for expert consultants in their village of Ajijic, Jalisco, MX since 2003.

**THE 2016 LIFE CARE PLANNING TOOLKIT: 8,000 Research Articles You Can Use to Support Evidence-Based Life Care Planning.** Penelope Caragonne, (See above for photo), and Keith Sofka

**COLLABORATING WITH LIFE CARE PLANNERS ON JOB SITE MODIFICATIONS: STANDARDS, METHODS AND OUTCOMES FOR JOB SITE MODIFICATION.** Keith Sofka,



Keith Sofka, Assistive Technology Provider (Ret.) is co-owner of Caragonne and Associates, LLC, has provided assistive technology, work site modifications, and architectural modification services to persons with disabilities for the last 30 years. When in active practice, Mr. Sofka was certified through the Rehabilitation Engineering Society of North America, Washington, DC. Mr. Sofka, when under contract to state and private agencies in Connecticut, Illinois, and Missouri, completed over 300 work site modifications to assist persons with disabilities in return to work, attend school or reside in more accessible environments. He often designed off-the-shelf and one-of-a-kind modifications. In the area of blind and low-vision services, Mr. Sofka consulted with Bureau for the Blind in Illinois and Missouri, with the Helen Keller Institute, the University of Indiana and the Greater New Haven Disability Rights Activist organization. Over the past 30 years, he designed and implemented hundreds of housing, school and workplace and

modifications throughout the US. Workplace modifications have been provided for a wide range of jobs -- from steelworkers to pig farmers to university professors. To assure successful return to work, Mr. Sofka also developed strategies to overcome housing and place of employment access obstacles as well as transportation difficulties. School modifications have ranged from development of facility access needs for a school district, specific access needs for a particular student and the implementation of an accessible computing lab at a University. He also provided services, as an ADA consultant, to hospitals seeking to meet accreditation access standards and businesses and Universities seeking to comply with requirements of Title II. He worked closely with hospitals to assist with home access modifications and development of environmental control systems as a part of the discharge planning process. As a partner of Caragonne and Associates, LLC, he frequently provides recommendations -- as a part of the life care planning process -- for individuals with catastrophic injuries. He develops Assistive Technology recommendations on a consulting basis with other life care planners to supplement their capabilities and to assure a comprehensive planning process. In a significant number of cases he works with individuals post-litigation to implement Assistive Technology recommendations. He has served as a peer reviewer for the Rehabilitation Services Administration and has also provided testimony related to reasonable access and the Americans with Disabilities Act. He and his wife designed much, if not all, of the curricula for the annual March Leisure and Learn conferences during the first six of its inception. Both work actively with the Lake Chapala Society, Ninos Incapacidos and CASA in Ajijic.

