



MARGO BONNELL KUNZE, RN, CDP

515 8th Avenue
Belmar, New Jersey 07719

Tel: 844-633-5345

Email: MKunze@medlegalpro.com

Experienced nurse consultant with over 30 years experience supervising operations in long term care (nursing homes) and assisted living facilities. Areas of focus include regulatory compliance, policies and procedures, quality control, electronic health records, care planning, and staff management. Certified Assisted Living Administrator (Ret). Former Clinical Research Coordinator. Published author. Certified Dementia Practitioner. Invited speaker.

PROFESSIONAL EXPERIENCE

AL CONSULTING, Belmar, New Jersey

PRESIDENT, 10/2000 to Present

- AL Consulting provides consultation, opinion and expert witness services to the legal profession, with a focus on assisted living, independent/residential/personal care, group homes, memory care units, skilled nursing and other post-acute care facilities. AL Consulting additionally provides management and clinical care consultation, quality improvement and education- to the post-acute care and assisted living professions. At present, AL Consulting, also provides 24/7 telephonic, hands-on and on-site consulting services as needed for two NJ Assisted Living Communities for regulatory compliance issues, resident assessment and status change consultation, admission and retention discussions and decisions, policy and procedure development, review and revision, resident care director orientation and all nursing management issues.

GENESIS HEALTHCARE CORPORATION ASSISTED LIVING COMMUNITIES, Kennett Square, Pennsylvania

CORPORATE MANAGER CLINICAL OPERATIONS - ALFs, 10/13/00 to 6/1/12

- Provided oversight for regulatory compliance, education, advocacy and quality clinical care to 48 Assisted Living, personal care and independent residential communities in 12 Eastern states to improve resident quality of life, quality of care and work environment for 4800 customers and employees.
- Accountable for development, implementation and oversight of policies and procedures, quality improvement programs, quality audit tools, regulatory compliance, annual state survey preparation, problem identification and solutions, education, quality reviews, clinical outcomes data collection tool development, data collection and compilation of clinical data points. Conducted extensive chart reviews and complaint resolution, developed and conducted mock surveys as indicated.
- Acted as liaison and advisor to the Director of Dementia Services and the communities with dementia-specific programs or secured units and all other regional and national parties responsible for food and nutrition, activities, admissions, etc. Developed and implemented policies and procedures to support Assisted Living concepts and quality care. Directed the development, training, implementation, and on-going upgrades of the electronic health record powered by PCC.

Margo B. Kunze, RN – Curriculum Vitae

Revised: October 4, 2021

Page 1 of 6

- Acted as consultant and mentor to Resident Care Directors to promote and support Assisted Living through on site or computer-based chart reviews and investigations of resident, family, state or staff complaints or concerns. Assisted in preparing or reviewing plans of correction following state inspections.

MULTICARE and GENESIS HEALTHCARE CORPORATION

CORPORATE MANAGER OF INFORMATION SYSTEMS CLINICAL APPLICATIONS, 3/94 to 10/13/00

- Accountable for the day-to-day oversight of support for 14 different healthcare software applications developed for quality assurance, state and federal regulatory compliance and improvement in the delivery of care to 40,000 elders in 260 plus long-term care centers, more than 48 assisted living communities, home care services and rehabilitation services in 16 states. (Genesis)
- Responsible for application review for improved functionality, modifications and inclusion of end user requests. Involved in decision making processes for new application purchase, feasibility studies, project management, resource allocations. Actively participate in strategic and tactical budget planning. (Genesis and MultiCare)
- Responsible for training of Achieve EMR for the clinical staff of 57 long term care facilities in 9 states involving instruction in the use of the computer, business processes, EMR, Folstein Mini Mental Status Examination to determine cognitive status and the Federally mandated MDS (Minimum Data Set) for all long-term care facility residents, care planning and goal setting in addition to the technical computer usage. (MultiCare)

MULTICARE COMPANIES, INC, Corp Headquarters- Hackensack, NJ

CONNECTICUT REGIONAL QUALITY ASSURANCE CONSULTANT, 7/93 to 1994

- Responsible for all aspects of clinical oversight, quality improvement, OBRA and state regulatory compliance for 10 long term care centers with primary focus on use of the Folstein Mini Mental Status Examination, alternatives to restraints and psychoactive medications, lectures on Alzheimer's disease and other Dementias.

COURTLAND GARDENS HEALTH CARE CENTER, Stamford, CT

ALZHEIMER'S UNIT MANAGER, 10/92 to 7/93

- Responsible for a 60-bed locked special care dementia unit. Evaluated assisted living residents on admission to the assisted living center. Worked with and relieved the Director of Residents services. Facilitated Alzheimer's District Support Group meetings bi-monthly

JACKSON HEALTHCARE CENTER, Jackson, NJ

ASSISTANT DIRECTOR OF NURSING SERVICES, 9/91 to 9/92

- Responsible for the day-to-day management and operations of a 186-bed long term care center with 190 staff members in partnership with the Director of Nursing Services. Developed policies and procedures to enhance the resident care, quality of life. Created nursing department policies and procedures to improve the quality of care throughout the center.

JACKSON HEALTHCARE CENTER, Jackson, NJ

DIRECTOR OF EVERGREEN PROGRAM, 9/91 to 10/92

STAFF RELIEF CHARGE NURSE, 3/91 to 9//91

- Developed, planned and executed retro decorating changes, hired and trained staff for a 26-bed dedicated special care dementia unit. Lectured for many groups. Facilitated monthly Alzheimer's and Related Disorders support group meetings.

THE GROVE HEALTH CARE CENTER, Neptune, NJ

UNIT MANAGER, 11/90 to 3/91

- Managed geriatric nursing unit with emphasis on development of standards, procedures, protocols, forms and systems for quality geriatric health care deliver and accountable for all home care clients on a 24 hour per day basis.

NURSEFINDERS OF THE JERSEY SHORE, Shrewsbury, NJ

STAFF RELIEF CHARGE NURSE, 3/91 to 9/91

DIRECTOR OF HOME CARE, 5/89 to 11/90

- Responsible for management of geriatric nursing units in various long term care facilities. Supervised R.Ns., L.P.Ns. and certified nursing assistant staff throughout Monmouth and Ocean Counties in maintenance of charting, office records, and staffing assignments for home health care

RIVERVIEW MEDICAL CENTER, Red Bank, NJ

STAFF NURSE-ONCOLOGY/HOSPICE, 3/88 to 5/89

- Responsible for chemotherapy, pain management, and emotional support to patients and families; assisted in discharge planning; worked closely with Hospice and Oncology Support Department.

JUPITER HOSPITAL, Inc., Jupiter, Florida 1982 to 1987

PROJECT DIRECTOR CLINICAL RESEARCH COORDINATOR, Dartmouth University 11/84 to 12/87

- Intraventricular Infusion of Bethanechol for the Treatment of Alzheimer's Disease Research Project along with patient care and liaison between Jupiter Hospital, Inc.'s Alzheimer's Research Project and Dartmouth University.

PALM BEACH COUNTY ALZHEIMER'S IN-HOME RESPITE SERVICE (P.B.C.A.I.R.S.), 10/86 to 12/87

- Responsible for grant preparation, program development, staff training and development, development of tools and data collections systems and tools, and day-to-day operation of Palm Beach County's first Alzheimer's Respite program. Served 186 clients first month. Staff of 15, 6 volunteers; \$200,000 annual budget

SUPPORTIVE CARE TEAM COORDINATOR, 5/86 to 12/86

- Coordinated multi-disciplinary activities of a "hospice" concept team dealing with the terminally ill. Coordinated in-hospital staff, home health staff and volunteers with physician supervision. Organized meetings, prepared agenda.

ALZHEIMER'S DISEASE / RELATED DISORDERS IN-HOME RESPITE CARE/SUPPORTIVE CARE TEAM, 5/86 to 12/87

- Responsible for preparation and presentation of eight hours of Alzheimer's Disease training to volunteer Respite Care Workers to provide in-home respite care to primary care givers. Trained ten volunteers.

STATEWIDE ALZHEIMER'S DISEASE LECTURER, Florida 1/85 to 12/87

FACILITATOR, Alzheimer's Disease and Related Disorders Support Group, 3/85 to 12/87

JUPITER HOSPITAL, INC. / SALHAVEN HOME HEALTH AGENCY

HOME HEALTH COORDINATOR, Jupiter, Florida, 12/83 to 11/86

DIRECTOR, Jupiter Island Nurses Station, 12/83 to 11/86

- Provided oversight and direction to licensed nursing staff providing direct nursing services to seasonal residents of Jupiter Island Club

PALM BEACH JUNIOR COLLEGE, Lake Worth, FL

GUEST LECTURER, 6/86 to 12/87

- Prepared and presented a series of four-hour long lecturers on Alzheimer's Disease to Allied Health Psychology students on semester basis.
- Assisted with the development of software program for IBM 38, HPMS for home health user. Responsible for the development of and day-to-day operation of Palm Beach County's first hospital-based Home Health Agency

Margo B. Kunze, RN – Curriculum Vitae

Revised: October 4, 2021

Page 3 of 6

PALM BEACH COUNTY, Jupiter, Florida
COMMUNI-CALL COORDINATOR, 7/84 to 11/86

- Responsible for the marketing, distribution and installation of Home Medical Alert System for Palm Beach County
Targeted market: adults aged 65 and over

EDUCATION

- Lenox Hill Hospital School of Nursing, Diploma program, New York, New York, Class Standing -15
- Mesa College, San Diego, California, Health Care concentration course work
- Alta Assisted Living Administrator's Course, New Jersey
- Dale Carnegie: Management and Communications
- Rutgers Nursing Informatics Training
- Pilot Light Management Program (Genesis Health Ventures)
- Stephen Covey Personal Management Course (MultiCare)
- Continuing Education: Multiple Units, minimum 32 continuing education units every two years - with focus on assisted living administration and trends, long term care regulatory issues and quality improvement, computer sciences

LICENSURE

Registered Professional Nurse
Current: New Jersey and retains inactive New York licensure

CERTIFICATION

Assisted Living Administrator (CALA) **RETIRED**
Inactive at present: New Jersey
Certified Dementia Practitioner

GRANTS SECURED

Wrote, submitted and received the following grants to establish Alzheimer's In-Home Respite Services

- State of Florida Department of Health and Rehabilitative Service: \$129,838
- Retirement Research Foundation: \$40,000
- Lost Tree Village: \$5,000

AFFILIATIONS- CURRENT

- Alzheimer's Association
- NCAL – (National Center for Assisted Living) associate, past member of the Quality Committee
- AALNA- (American Assisted Living Nurses Association) member of national board of directors (Current Secretary/Treasurer)
- New Jersey Chapter of AALNA- (American Assisted Living Nurses Association) Charter Member and Current Treasurer
- HCANJ- (Health Care Association of New Jersey) Education, Convention and Best Practices Committees.
- AALNA representative and member of Assisted Living/Non-Institutional Subcommittee of AMDA – The Society for Post-Acute and Long-Term Care Medicine (PALTC)

- Member Advisory Board- Addressing Behavior and Mood in Assisted Living: Organizational Characteristics Related to the Use of Antipsychotics and Psychotropic Medications and Alternative Practices (National Institute on Aging Grant R01 AG050602)
- Reviewer/pilot testing CDC's new Infection Preventionist Course
- NIA advisor on the National Institute on Aging "Medical and Mental Health Care in Assisted Living" study
- Member National Adult and Influenza Immunization Summit (NAIIS) Influenza Workgroup
- Member Advisory Committee National Institute On Aging's University of North Carolina(UNC) Medical and Mental Health Care in Assisted Living Meeting
- Member University of North Carolina Advisory Committee: Dementia Care in Assisted Living
- Member Post-Acute Long Term Care (PALTC formerly AMDA American Medical Directors Association).
- Member PALTC/AMDA non-institutional/ assisted living sub committee
- Member PALTC/AMDA Diversity, Equality, Inclusion sub committee (DEI)

AFFILIATIONS- PAST

- Florida State Alzheimer's Disease Initiative Subcommittee for the creation of a state-wide Alzheimer's patient registry
- Development of merged data collection tools; pilot project coordinator for Palm Beach County.
- Jupiter Hospital Cancer Committee; development of interdisciplinary network
- American Cancer Society Service and Rehabilitation Committee
- First Aid Merit Badge Counselor, Boy Scouts of America
- ADEAR (Alzheimer's Disease Education and Referral Center) formation on Alzheimer's disease research, clinical trials, publications, bibliographic database, and links to other Federal resources. ADEAR is a service of the National Institute on Aging, National Institutes of Health
- Member of Connecticut Alzheimer's Coalition
- Chairman of the Fairfield County Alzheimer's Association Membership Committee
- AHCA – (American Health Care Association) Member

PUBLICATIONS

- 2012 to present responsible for the revision and submission of the Health Care Association of New Jersey Best Practices for Falls Management and Medication Management for the National Guideline Clearinghouse™ and approval and publication on the Agency for Healthcare Research and Quality (AHRQ) website.
- Regular Contributing author of multiple articles to the Geriatric Nursing Journal

Margo B. Kunze, RN – Curriculum Vitae

Revised: October 4, 2021

Page 5 of 6

- Author and co-editor of The Pulse, the quarterly AALNA (American Assisted Living Nurses Association) publication providing education and communication to and with AL nurses nationwide through 2017
- Author and editor of “Genesis Today” quarterly Assisted Living informational external marketing tool for Genesis HealthCare Corporation from 2010 to June 2012

PRESENTATIONS

- New Jersey Chapter of the Association of Directors of Nursing Annual Convention April 17, 2018- In-Depth review of NJ Assisted Living Regulations and Process to Obtain Waivers to Promote Retention of Residents. Discussion of managing behaviors in residents with dementia included n strategies.
- American Geriatrics Society Meeting “Charting a Path to Increase Immunization Rates in the Long-Term Care Setting.” May 2, 2018 Presentation 1- Engaging Long-Term Care Facility Leadership: Taking Ownership of Vaccination and Addressing Organizational Barriers Presentation 2- Financing: Addressing Cost and Billing Concerns
- PALTC/AMDA Annual Convention- Virtual Conference Quality Measurement in Assisted Living Communities: Current Advances and Controversies April 2, 2020