



COURAGE IGNITED

2024 SPRING CONFERENCE

LeadingAge™
Wisconsin

May 1-3, 2024

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Courage Ignited

- *Giving voice to things that matter takes courage.*
- *Being creative and breaking new ground takes courage.*
- *Cultivating an environment where staff and older adults thrive takes courage.*
- *Doing the right thing for the right reasons takes courage.*

When we tap our inner strength and combine it with thousands of others who share our common purpose, courage is ignited.

Join us at the LeadingAge Wisconsin 2024 Spring Conference & Annual Business Meeting to explore innovative and courageous ways to redefine your work. This conference will focus on empowering you to develop the courage to overcome obstacles, take risks, and pursue your goals with confidence. You'll engage with our sector's leading experts and network with fellow aging services professionals. As a provider seeking to inspire your team, you'll find everything you need and more to overcome fear, face adversity, and build resilience. Ignite your passion for serving others and feel the spark that inspires us all to make Wisconsin a better place to grow old.

Register today at <https://cvent.me/MPr4Rk> for the 2024 Spring Conference and Annual Business Meeting.

Courage Ignited

May 1-3, 2024

Kalahari Resorts & Conventions

This conference continues our commitment to high quality education that serves the interests and needs of all aging service providers -- long-term care, assisted living, senior housing, and community service programs.

Registration Fees

LeadingAge Wisconsin Members/Subscribers

May 1 - Pre-conference	\$ 35 per person
May 2-3 - Conference	\$310 per person
May 2 only - Conference	\$250 per person
May 3 only - Conference	\$125 per person

Non-Members of LeadingAge Wisconsin

May 1 - Pre-conference	\$ 70 per person
May 2-3 - Conference	\$360 per person
May 2 only - Conference	\$300 per person
May 3 only- Conference	\$175 per person

These fees reflect the early bird registration fee. If you complete your online registration after April 10, 2024, you will be charged the regular registration fees, which reflect an increase of \$10 per person for the pre-conference and an increase of \$25 per person for the conference. The registration fee for the pre-conference workshops (May 1 - Pre-conference) is not included in the conference registration fee.

The conference registration fee includes the educational sessions, admission to the Annual Business Meeting, the Welcoming Reception, the Hospitality Reception, access to the conference app, name badges, break refreshments, and meals listed in this program booklet.

Cancellation Policy

Any conference cancellation prior to April 23, 2024 will receive a 100 percent refund of the registration fee. After April 23 2024, if you need to cancel your registration due to survey, illness, or death in your immediate family, please contact LeadingAge Wisconsin (JMashak@LeadingAgeWI.org) to discuss refund options.

Location & Accommodations

Kalahari Resorts & Conventions
1305 Kalahari Drive
Wisconsin Dells WI 53965

Please reserve your rooms now using the linked passkey below. Room rates begin at \$115 per night, and overnight accommodations are available on a first-come-first-served basis.

Booking Website:

<https://book.passkey.com/e/50741464>

The LeadingAge Wisconsin discounted rates apply only if you make your room reservations by April 1, 2024. Reservations made after that date will be subject to availability and will be charged at the standard room rate.

Please make note of Kalahari's Cancellation Policies: Kalahari will waive the \$25 processing fee on cancellations made 72 hours or more prior to arrival. Kalahari will waive the forfeiture of the entire deposit on cancellations made within 72 hours prior to arrival if they are due to a death of an immediate family member, illness, weather, or for state survey completion.

Kalahari does not accept completed Letters of Authorization forms, Tax Exemption forms, nor Purchase Orders at the hotel check-in. They have a dedicated team that approves these forms to ensure validity prior to check-in. These forms should be submitted no later than 7 days in advance to dellscallcenterfax@kalahariresorts.com or 608-254-6116. They highly suggest that you submit these forms a minimum of two weeks prior to hotel check in so their team can process them in a timely manner. Failure to follow this procedure may result in full room and tax charges to you on your personal cards since the front desk will not accept these forms at check-in. If you have any questions please review their policies in full detail. (<https://www.kalahariresorts.com/wisconsin/help/faq/>).

Online Registration

What if you could get a quick glimpse of everything this conference has to offer, access detailed descriptions of every session, and register online? You can!



Click Here to Register:
<https://cvent.me/8XYEQv>

To qualify for the early registration discount, you must complete and submit your registration by April 10, 2024.



Click Here
for a Conference Summary:
<https://cvent.me/MPr4Rk>

All registrations must be completed online. As previously noted, separate registration fees apply for the pre-conference workshop and the conference sessions.

For Additional Information Contact

LeadingAge Wisconsin
204 South Hamilton Street
Madison WI 53703
608-255-7060
LeadingAgeWI.org
JMashak@LeadingAgeWI.org

Schedule at a Glance

Wednesday, May 1, 2024

8:00 a.m. to 4:30 p.m.	Registration Open
9:00 a.m. to 11:30 a.m.	LeadingChoice Network All-Member Meeting <i>(LeadingChoice Network members only)</i>
10:15 a.m. to 11:30 a.m.	Networking Meetings There will be networking meetings for: Assisted Living Professionals, Clinical Professionals, Finance Professionals, Workforce Professionals, Social Service Professionals, Marketing Professionals, and Senior Housing Professionals.
11:45 a.m. to 1:00 p.m.	LeadingAge Wisconsin Board of Directors Meeting
1:15 p.m. to 4:30 p.m. (with a 15-minute break)	Pre-conference Workshops (Details on pages 6-8) PC1 - <i>Workforce Wake-Up Call: It's Time to Operationalize Turnover</i> (Sponsored by Marsh McLennan Agency) PC2 - <i>ICD-10, MDS and PDPM: Tips to Ignite Success</i> PC3 - <i>Courage Unleashed: Navigating Self-Wellness and Resilience in Healthcare</i> PC4 - <i>Navigating Ethical Dilemmas in Long-Term Care: Principles in Practice</i>
2:45 p.m. to 3:00 p.m.	Break (Sponsored by Compass Community Living Hospitality Group)
5:00 p.m. to 6:30 p.m.	Welcome Reception (Sponsored by M3 Insurance and Colliers Securities)

Thursday, May 2, 2024

7:00 a.m. to 4:30 p.m.	Registration Open
7:00 a.m. to 8:00 a.m.	Continental Breakfast (Sponsored by Select Rehabilitation)
8:15 a.m. to 9:30 a.m.	Conference Opening & Keynote Address (Details on page 11) <i>The Upside</i> (Sponsored by Ziegler)
9:30 a.m. to 10:15 a.m.	LeadingAge Wisconsin Annual Business Meeting (Details on page 11)
10:15 a.m. to 10:30 a.m.	Break (Sponsored by Wisconsin Health & Education Facilities Authority - WHEFA)
10:30 a.m. to 11:30 a.m.	Six Simultaneous Breakout Sessions (Details on pages 13-16) A01 - <i>Igniting the Courage to Navigate Transformation</i> A02 - <i>Become the Leader You Want to Follow: Ignite the Clinical Leader Within (Part 1)</i> A03 - <i>Family Care and Quality Care: Exploring the Possibilities of Collaboration</i> A04 - <i>The Intangible It</i> A05 - <i>Managing Tenant Acuity in the Resident Care Apartment Complex Setting</i> A06 - <i>Your Money. Your Mission.</i>
11:30 a.m. to 12:30 p.m.	Lunch (Sponsored by Value First)
12:30 p.m. to 1:30 p.m.	Six Simultaneous Breakout Sessions (Details on pages 17-19) B07 - <i>Igniting Your Succession Planning</i> B08 - <i>Become the Leader You Want to Follow: Ignite the Clinical Leader Within (Part 2)</i> B09 - <i>Senior Living Update, Challenges, and Reimbursement Opportunities</i> B10 - <i>How to Have Your Next Difficult Conversation (Part 1)</i> <i>Guiding Principle and Frameworks</i> B11 - <i>Courage Ignited: Resident-directed Care Planning in the CBRF Setting</i> B12 - <i>The Key Components of a Premier Workplace Culture</i>

1:30 p.m. to 1:45 p.m.	Break (Sponsored by Community Living Solutions)
1:45 p.m. to 2:45 p.m.	Six Simultaneous Breakout Sessions (Details on pages 20-22) C13 - <i>AI and Aging: Navigating Tomorrow's Senior Care with Tech and Heart</i> C14 - <i>Understanding Wisconsin's Continuum of Services from a Clinical Perspective</i> C15 - <i>Risk Insights during a Transaction: Mergers, Acquisitions, Divestments, & Beyond</i> C16 - <i>How to Have Your Next Difficult Conversation (Part 2)</i> <i>Case Studies & Applications</i> C17 - <i>Driving Occupancy in Senior Living and Assisted Living</i> C18 - <i>The Courage to Care through Religion, Spirituality, and Prayer</i>
2:45 p.m. to 3:00 p.m.	Break (Sponsored by HealthDirect Pharmacy)
3:00 p.m. to 4:00 p.m.	Six Simultaneous Breakout Sessions (Details on pages 24-26) D19 - <i>Break - Breathe - Ignite</i> D20 - <i>Ignite the Spark To Grow Your Clinical Team</i> D21 - <i>Having the Courage to Affiliate</i> D22 - <i>Innovative Staffing Solutions</i> D23 - <i>GUIDE: Medicare's Model for Transforming the Senior Living Approach to Memory Care</i> D24 - <i>Your Guide to Completing the Medicaid Application</i>
5:00 p.m. to 6:30 p.m.	Hospitality Reception (Details on page 27) (Sponsored by CLA; Hoffman Planning, Design & Construction; Martin Bros; and Compeer)
After 6:30 p.m.	LeadingAge Wisconsin Business Partners Hosted Events
8:00 p.m. to 10:00 p.m.	M3/CLA/Ziegler Spring Conference Hosted Event (Details on page 30)

Friday, May 3, 2024

6:45 a.m. to 10:45 a.m.	Registration Open
7:00 a.m. to 8:15 a.m.	Breakfast Buffet
8:30 a.m. to 9:30 a.m.	Six Simultaneous Breakout Sessions (Details on pages 31-33) E25 - <i>Strategies for Bravely Facing Medicare Advantage</i> E26 - <i>Regulators, Providers and Advocates: Building Partnerships for Quality Care (Part 1)</i> E27 - <i>Streamline Your Finances (Part 1)</i> E28 - <i>Leadership On Purpose (Part 1)</i> E29 - <i>Igniting Engagement: Supporting Staff in Applying Dementia Skills (Part 1)</i> E30 - <i>Illuminate the QAPI Program for ALL!</i>
9:30 a.m. to 9:45 a.m.	Break (Sponsored by Lincare)
9:45 a.m. to 10:45 a.m.	Six Simultaneous Breakout Sessions (Details on pages 35-37) F31 - <i>Changing Medicare Advantage Policy and How Providers Can Influence It</i> F32 - <i>Regulators, Providers and Advocates: Building Partnerships for Quality Care (Part 1)</i> F33 - <i>Streamline Your Finances (Part 2)</i> F34 - <i>Leadership On Purpose (Part 2)</i> F35 - <i>Igniting Engagement: Supporting Staff in Applying Dementia Skills (Part 2)</i> F36 - <i>Corporate Compliance: Reigniting the Conversation</i>
10:45 a.m.	Adjournment

Wednesday, May 1 - 1:15 p.m. to 4:30 p.m. (with a 15-minute break)



PC1

Workforce Wake-Up Call: It's Time to Operationalize Turnover

As pensions have disappeared, the long-term employee commitment has shifted to a shorter-term stay. While organizations can reduce employee turnover, they cannot eliminate it, which means staffing challenges caused by employee turnover are here to stay. Due to this new reality, it's time for leaders to rethink staffing stability and set realistic goals, budgets, and business models around unavoidable turnover. The best way to increase employee retention moving forward is to plan for and adjust current operations to better manage forecasted levels of employee turnover. This reduces the shock and business disruption from staff departures. In this workshop, a Magnet Culture Workforce Thought Leader will explore strategies for operationalizing turnover so your organization can become a well-oiled machine that maximizes the time you have with each new employee to meet your company's goals and customer expectations.

Learner Objectives:

- Explore the latest workforce developments as unveiled in this "State of the Workforce" address.
- Discuss how you can increase operational efficiency by planning and implementing strategies to reduce and embrace turnover.
- List ways to keep people longer, enhance productivity, and improve profitability.

Learner Level: Intermediate

Presenter: Carrie Murphy, Retention Strategist, Magnet Cultures, Memphis, IN

Important Note Regarding Registration for the Pre-conference Workshops: Registration for the pre-conference workshops is *not* included in your conference registration fee. There is a per person fee (\$35 for members/subscribers; \$70 for non-members if you register by April 10, 2024) for any of the pre-conference workshops. There is a separate (per person) registration fee for the 2024 Spring Conference.

Diamond Sponsor

Pre-conference Workshop PC1

Workforce Wake-Up Call: It's Time to Operationalize Turnover

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**Marsh McLennan
Agency**

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Brookfield, WI 53045
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Marsh McLennan Agency (MMA) has several offices throughout Wisconsin serving over 250 senior living facilities. MMA provides custom insurance and risk management solutions to your company's specific exposures. We have been providing all types of insurance coverage, including medical benefits, to the senior living industry for over 30 years. Please contact us at 262-797-6293.

Diamond Sponsor

Refreshment Break

Wednesday, May 1, 2024 -- 2:45 p.m. to 3:00 p.m.

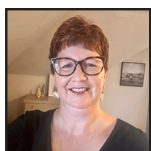
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Wednesday, May 1 - 1:15 p.m. to 4:30 p.m. (continued) (with a 15-minute break)



PC2

ICD-10, MDS and PDPM: Tips to Ignite Success

This session is designed to spark your interest and ignite your passion for PDPM and ICD-10 coding. In this interactive session, we will explore the requirements for ICD-10 coding. We will delve into the specifics of the ICD-10 and MDS coding to ensure maximum reimbursement. We will review the PDPM categories and qualifiers of PT/OT, SLP, NTA and nursing components (extensive services, special care high, special low, and clinically complex) and necessary documentation to support MDS coding.

Learner Objectives:

- Discuss how to accurately determine primary diagnoses and sequence additional diagnoses in order to assign correct codes that maximize reimbursement.
- Discuss how to correctly use and assign aftercare codes, sequelae codes, sepsis codes, M-codes, and A-codes.
- Outline PDPM categories and qualifiers and analyze their impact on revenue.
- Identify opportunities for coding the MDS to ensure maximum reimbursement and accurate coding through completion of case studies.

Learner Level: Intermediate

Presenters: Amy Veldt, RN Consultant, Pinnacle Innovative Healthcare Solutions, Black Creek, WI; Victoria Wolf, RHIT, CPHQ, Allied Health Instructor, School of Health | Allied Health, Waukesha County Technical College, Pewaukee, WI



PC3

Courage Unleashed: Navigating Self-Wellness and Resilience in Healthcare

Join this interactive seminar focusing on both physical and mental wellness. Learn practical strategies to enhance your overall health and well-being. Our guest speakers will guide you through targeted exercises for stress relief, ergonomic practices for physical health, and mindfulness techniques to support mental resilience and strength. Gain practical insights to integrate self-care into your daily routine, fostering a healthier work-life balance. Elevate your personal and professional fulfillment in this holistic approach to wellness for healthcare professionals.

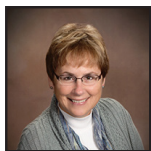
Learner Objectives:

- With a focus on physical well-being, discuss what you can do to address common physical stressors in healthcare work and create a more comfortable work environment.
- List tools you can utilize to cope with stress, improve mental resilience, and foster a positive mindset, ultimately enhancing your ability to navigate the demands of your profession.
- Develop a plan to seamlessly integrate practical physical and mental wellness practices into your daily life and to create sustainable habits to promoting long-term well-being.

Learner Level: Intermediate

Presenters: Kate Brewer, PT, MBA, President and CEO, Greenfield Rehabilitation Agency and Rehab Resources, Brookfield, WI; Michelle Strege, MS/CCC-SLP, CADDCT-CDP, Director of Sales and Marketing, Greenfield Rehabilitation Agency and Rehab Resources, Brookfield, WI; Kerry Klecic, CLCS, CIC, Vice President – Aging & Human Services Vertical, Brown & Brown of Wisconsin, Wauwatosa, WI; Meghan Meyers, Health & Wellness Consultant, Brown & Brown of Wisconsin, Wauwatosa, WI

Wednesday, May 1 - 1:15 p.m. to 4:30 p.m. (continued) (with a 15-minute break)



PC4

Navigating Ethical Dilemmas in Long-Term Care: Principles in Practice

Through this interactive discussion, we will dive deep into the ethical dilemmas and considerations that arise in long-term care settings. As we explore foundational ethics and principles, we will engage in thoughtful dialogue around real-world scenarios involving resident autonomy, quality of life, resource allocation, and other complex issues. Come with your questions and ethical situations. Our goal is to gain greater understanding and clarity around navigating these challenges with wisdom and compassion.

Learner Objectives:

- Analyze real-world ethical dilemmas in long-term care settings through the lens of resident self-determination, staff capacity, and best practices.
- Evaluate approaches for balancing competing priorities and obligations when faced with ethical challenges related to resident autonomy, quality of life, resource allocation, and other complex issues.
- Develop strategies for addressing ethical gray areas in long-term care with wisdom, nuance, and compassion.

Learner Level: Intermediate

Presenters: Kim Marheine, State Long-Term Care Ombudsman, State of Wisconsin Board on Aging and Long-Term Care, Madison, WI; Alyssa Gahlman, Director of Social Services, Clearview, Juneau, WI

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Wednesday, May 1, 2024 -- 5:00 p.m. to 6:30 p.m.

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M3's Senior Living & Social Services Practice leads the way in benefits and business insurance for your organization. Our team helps you navigate changing regulations, exposures to litigation, and a challenging employment landscape.

Diamond Sponsor**Welcoming Reception Food**

Wednesday, May 1, 2024 -- 5:00 p.m. to 6:30 p.m.

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Colliers Securities is committed to providing a full spectrum of financing solutions for each client's unique capital finance needs. Since 1977, we have served the financing needs of senior living and healthcare facilities, including new construction, renovations and expansions, as well as refinance vehicles for existing debt. Nationally, we are a top-ten underwriter of senior living debt, as well as a leading provider of HUD, USDA, and Fannie Mae financing through our affiliate, Colliers Mortgage.

Diamond Sponsor**Continental Breakfast**

Thursday, May 2, 2024 -- 7:00 a.m. to 8:00 a.m.

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Glenview, IL 60026
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Select Rehabilitation provides comprehensive physical, occupational, and speech therapy services to patients in hundreds of sites across the country and also partners with clients to provide expertise in regulatory and reimbursement issues.

Emphasis is placed on patient-focused, outcome-driven services allowing patients to successfully transition and remain in their discharge environment.

Diamond Sponsor**Refreshment Break**

Thursday, May 2, 2024 -- 10:15 a.m. to 10:30 a.m.

Sponsored By

Wisconsin Health & Educational Facilities Authority
18000 W Sarah Lane, Suite 300
Brookfield, WI 53045-5841
262-792-0466 • www.whefa.com

Created by the Legislature in 1973, WHEFA is a conduit issuer of tax-exempt revenue bonds, facilitating tax-exempt financing access for all non-profit organizations in the State of Wisconsin. WHEFA assists these institutions to obtain and maintain access to tax-exempt financing to finance or refinance capital improvements and expansion needs. WHEFA is a resource when researching and evaluating various financing options. Irrespective of the ultimate plan of finance, WHEFA is here to help.

Thursday, May 2 - 8:15 a.m. to 9:30 a.m.



Keynote *The Upside*

The human kindness shared in times of crisis has Keynoter Jack Stahlmann examining the common thread that creates positivity during hardship. In recent years when humanity was maybe feeling its worst, LeadingAge Wisconsin members delivered their best. But the fallout of Covid-ian times created other problems, such as staffing shortages, burnout, and an increasing creep of a workplace staple: Negativity. In this keynote, Jack provides the tools to combat the Debbie or Donnie Downers by honing the upside.

Learner Objectives:

- Examine the science behind Hans Rosling's Negativity Theory, discuss why some people are more negative than others, and list strategies for navigating those workplace fun killers.
- Implement in your life the "yes and" state of mind that drives productivity and discuss how you will take the word "no" out of your vocabulary to create more productive conversations.
- Hone your consistency by going streaking (don't worry, all clothes will be staying on) and develop a plan for mastering the art of going on winning streaks.

Learner Level: Basic

Presenter: Jack Stahlmann, Professional Speaker, Don't Flinch, LLC, Saint Paul, MN

Thursday, May 2 - 9:30 a.m. to 10:15 a.m.



LeadingAge Wisconsin 2024 Annual Business Meeting

This is your association. Join us to celebrate our successes over the past year. Learn how we will ignite courage throughout senior services and supports during the year ahead. Elect the individuals who will serve on the LeadingAge Wisconsin Board of Directors, and adopt the budget for our new fiscal year.

According to the LeadingAge Wisconsin Bylaws, at the Annual Business Meeting, each provider member -- the owning corporation of the individual facility(s) -- with fifty (50) or more beds/units is entitled to two (2) voting representatives designated by the corporation's board of directors. Any provider member with less than fifty (50) beds/units is entitled to one (1) voting representative authorized by the corporation's board of directors.

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Keynote Address Featuring Jack Stahlmann

Thursday, May 2, 2024 -- 8:15 a.m. to 9:30 a.m.

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Diamond Sponsor**Deluxe Conference Name Badge Booklets with Conference Schedule***Sponsored By***Wipfli LLP****10000 W Innovation Drive, Suite 250****Milwaukee, WI 53226****715-858-6678 • www.wipfli.com**

Caring for your senior residents is a top priority but, increasingly, regulations, workforce shortages, and inadequate reimbursement are eating up your time.

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**Marsh McLennan
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Dave Hosack
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dave.hosack@marshmma.com

John Sarcia
Account Executive
john.sarcia@marshmma.com

Dan Nolde
VP, Employee Health & Benefits
dan.nolde@marshmma.com

Thursday, May 2 - 10:30 a.m. to 11:30 a.m.



A01

Igniting the Courage to Navigate Transformation

The senior services landscape is rapidly evolving. Organizations must adapt to changing demographics, technologies, regulations, and consumer expectations. This session will provide a national overview of key trends, challenges, and opportunities impacting senior living and services. We'll highlight innovative models, discuss how leading organizations are responding, and outline resources LeadingAge offers to help members navigate uncertainty. Our focus will be equipping executives to lead with vision and agility during this time of transformation.

Learner Objectives:

- Identify major trends shaping senior services and supports, including changing demographics, technologies, regulations, and consumer expectations.
- Recognize innovative models and approaches successful organizations are using to adapt to the evolving landscape.
- List resources and support available from LeadingAge to help navigate uncertainty and lead effectively during this transformative time.

Learner Level: Intermediate

Presenter: Katie Smith Sloan, President & CEO, LeadingAge, Washington D.C.

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The Attendee Lounge

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Reinhart

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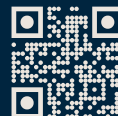
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We bring cutting-edge technology and innovation to the forefront of the senior living industry, creating efficiency, cost-savings, and the highest quality standards.

www.ccl-hg.com

Thursday, May 2 - 10:30 a.m. to 11:30 a.m. (continued)



A02

Become the Leader You Want to Follow: Ignite the Clinical Leader Within (Part 1)

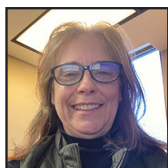
Leadership in today's healthcare world can seem overwhelming, leaving you questioning how to move forward with all that you have on your priority list. This two-part session will build upon foundational leadership skills and help clinical leaders identify the "next steps" in moving their team forward and enhancing communication skills all while achieving buy-in from your team for change. These interactive sessions will provide clinical leaders with streamlined tactics, tools, and resources to move from transactional to transformational leadership for success. (This discussion will continue in Session B08)

Learner Objectives:

- Discuss foundational leadership traits for today's clinical leader.
- Review key steps for implementing change to increase employee engagement.
- Define strategies to enhance leadership communication skills and processes.
- Identify streamlined tools and resources to guide implementation steps to achieve desired outcomes.

Learner Level: Intermediate

Presenter: Lisa Thomson, BA, LNHA, HSE, CIMT, Chief Operating Officer, Pathway Health, Lake Elmo, MN



A03

Family Care and Quality Care: Exploring the Possibilities of Collaboration

In this interactive one-on-one discussion, we will focus on the realities and practicalities of Family Care rates in relation to assisted living provider costs as we work to provide quality care for the residents. We will explore issues such as why caregiver wages lag behind CNAs despite comparable work and whether managed care rates can be negotiated to better reflect the actual cost of providing care for residents with increasing care needs. By sharing experiences on residents' changing conditions and care needs, functional screens, rates, and transitions from private pay, we'll explore various perspectives that reflect our vital role in working together to enable residents to age in place.



Learner Objectives:

- Discuss the complexities of establishing managed care rates in relation to the costs of providing quality care for residents with increasing needs.
- Discuss various perspectives on residents' changing care needs and the impacts on staffing, wages, costs, rates, and financial sustainability – for providers and for managed care organizations.
- Explore approaches for enabling residents to age in place through collaboration and innovation in service delivery and funding models.

Learner Level: Intermediate

Facilitator: Jacqueline Carley, Chief Financial Officer, Skaalen Retirement Services, Stoughton, WI

Panelists: Sara Muhlbauer, CEO, Lakeland Care, Oshkosh, WI; Wanda Plachecki, MA, NHA, Executive Director, La Crosse County Long Term Care & Residential Service, La Crosse, WI

What to Wear

LeadingAge Wisconsin encourages you to dress casually for all convention activities. The Kalahari does its best to provide a comfortable climate for our conference; however, everyone responds differently to climate-controlled environments, and sometimes it is warmer or cooler than you prefer. We hope you will take this into consideration when preparing for this conference and wear clothing that can be layered.

Thursday, May 2 - 10:30 a.m. to 11:30 a.m. (continued)



A04

The Intangible It

The Intangible It examines the “it” quality movie stars possess that you can’t quite put your finger on... or can you? By sharing humorous tales of his Tinseltown adventures, Jack breaks down the “it” factor that makes certain actors and actresses superstars and explores how to use those lessons to become a star in the aging services profession.

Learner Objectives:

- Define “The Gift” and discuss how to channel your inner-Clooney to make everyone you encounter feel important.
- Analyze “The Shift” and identify the secret that has given Tom Hanks such career longevity.
- Examine “The Connect” and list ways you can be more memorable to anyone you meet.

Learner Level: Basic

Presenter: Jack Stahlmann, Professional Speaker, Don’t Flinch, LLC, Saint Paul, MN



A05

Managing Tenant Acuity in the Resident Care Apartment Complex Setting

Have you been struggling to identify effective ways to manage the varying acuity levels within the residential care apartment complex (RCAC) at which you have responsibilities? Preparation and planning to meet the tenants’ needs and preferences is an ever changing and evolving process. This one-hour session will provide the participant with reasonable approaches and solutions to incorporate into the planning, delivery, and evaluation of services within the RCAC environment. Courage Ignite!

Learner Objectives:

- Develop strategies to identify gaps within existing systems that affect ability to meet tenant needs when acuity changes.
- Integrate evidence-based practices into RCAC workflows that elevate adaptability to practices in the RCAC environment to meet tenant changing needs.
- Verbalize value in leveraging key stakeholder engagement throughout a tenant’s stay in the RCAC setting.

Learner Level: Intermediate

Presenter: Lori Koeppel, RN, BSN, NHA, DNS-CT, WCC, Research Analyst, QID UW Madison - School of Medicine, Executive Director, Wisconsin DON Council Education Forum, Inc., Madison, WI

Conference App

About three weeks prior to the conference, registrants will be emailed information to download the conference app. Attendees can integrate their social media accounts, sync their conference schedules, set reminders for sessions, access the handouts, rate sessions, share contacts, send messages, navigate the event, and meet our many sponsors. Attendees will be able to navigate the conference from any mobile device. Everything about the conference will be accessible through the app – schedules, maps, session handouts, attendee lists, even the conference evaluation.

The LeadingAge Wisconsin 2024 Spring Conference App is sponsored by Baker Tilly, Madison, WI

Thursday, May 2 - 10:30 a.m. to 11:30 a.m. (continued)



A06

Your Money. Your Mission.

Money is emotional. It can wreak havoc on life if you aren't willing to take control of the relationship and conversation(s) within your financial household. Whether you are an educator, a business owner, or simply an individual looking to change the narrative of how we associate with money, this session will cover applicable ideas to create a positive relationship with money for you and/or your employees. Through real conversation, we have identified ways to help individuals own their financial journey and build out a financial literacy curriculum that is real, raw, and rewarding. Join us in discussing what that journey looks like and take part in the opportunity to help this generation and the next develop healthy money habits.

Learner Objectives:

- Define "Financial Wellness."
- Outline the attributes of a healthy money relationship.
- Develop a plan for creating a financial literacy curriculum that can be deployed in your home or workplace.

Learner Level: Intermediate

Presenter: Melissa Olson, Wealth Education Coordinator, Johnson Financial Group, Milwaukee, WI

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Online Registration

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Online Registration

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To qualify for the early registration discount, you must complete and submit your registration by April 10, 2024.



Click Here for a Conference Summary:

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All registrations must be completed online. As previously noted, separate registration fees apply for the pre-conference workshop and the conference sessions.

Thursday, May 2 - 12:30 p.m. to 1:30 p.m.



B07

Igniting Your Succession Planning

This session will provide CEOs, human resource professionals, and executive leadership with the courage to ignite your succession planning strategies. These easy-to-use tools will help you analyze the strength of your team, identify priorities and strategies for developing and retaining your workforce, and mitigate the impact of turnover in key leadership roles.

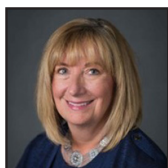


Learner Objectives:

- Analyze the role a human resource review plays in retaining talent and succession planning.
- Outline how to effectively use check-ins in employee engagement and succession planning.
- Discuss how to mitigate your risk from leadership turnover with “How To Be” manuals.

Learner Level: Intermediate

Presenters: Kathy Cavers, President & CEO, Lutheran Home & Harwood Place, Wauwatosa, WI; Danielle Unger, Administrator, Lutheran Home, Wauwatosa, WI



B08

Become the Leader You Want to Follow: Ignite the Clinical Leader Within (Part 2)

Discussion will continue from Session A02

Learner Level: Intermediate

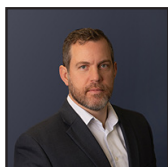
Presenter: Lisa Thomson, BA, LNHA, HSE, CIMT, Chief Operating Officer, Pathway Health, Lake Elmo, MN



B09

Senior Living Update, Challenges, and Reimbursement Opportunities

There continue to be many developments happening within senior living that are affecting the day-to-day operations and long-term strategies of organizations. With workforce challenges, slow recovery of census, industry consolidations, and changing regulations, there are many considerations for executives to think about that will impact the direction of their organizations. In addition to ever increasing resident assessment scrutiny, greater focus on staffing, quality metrics, and reimbursement challenges at the national and local levels, leaders have even more to consider while evaluating their organization's financial performance. This session will focus on recent events impacting providers. In addition to giving a high-level overview, the discussion will address federal and state reimbursement considerations, including Wisconsin's Medicaid and Medicare reimbursement using the Patient-Driven Payment Model (PDPM). Participants also will learn how to minimize risk or maximize value through evaluating operational Key Performance Indicators (KPIs).



Learner Objectives:

- Recognize current developments within the senior services and supports environment.
- Analyze the drivers within clinical documentation that impact reimbursement at the state and federal levels.
- Identify operational outliers that can translate into financial opportunities.

Learner Level: Intermediate

Presenters: Ed Klik, Principal, Baker Tilly, New Castle, PA; Kris Pattison, Director, Baker Tilly, Pittsburgh, PA

Thursday, May 2 - 12:30 p.m. to 1:30 p.m. (continued)



B10

How to Have Your Next Difficult Conversation Part 1: Guiding Principle and Frameworks

Conflicts among staff members can disrupt productivity, damage morale, and hinder organizational success. This session offers a strategic approach to managing conflicts by leveraging effective conversational skills. Designed for employers, managers, and team leaders, this session will enhance your conversational skills, help you cultivate stronger relationships with your teams, and promote a culture of trust, growth, and development within your organizations.

Learner Objectives:

- Analyze what really drives human behaviors and emotions and discuss how to use that for increased trust and performance at work.
- Identify specific strategies to build connection, depending on the level of activation, defensiveness, or apathy, in any conversation.
- Discuss what you can do to improve your communication skills and boost your confidence when handling difficult conversations.

Learner Level: Basic

Presenter: Yvette Erasmus, MEd, PsyD, LP, Consulting Psychologist, Yvette Erasmus LLC, Minneapolis, MN



B11

Courage Ignited: Resident-directed Care Planning in the CBRF Setting

One of the biggest challenges in the community-based residential facility (CBRF) setting is developing a truly resident-centered, resident-directed Individual Service Plan (ISP). We want our residents to “live their best life,” including days filled with opportunities and choices. Yet we also need to acknowledge and support the things necessary to promote their health and well-being. Ideally, these concepts align, but what if they don’t? How do we strike that delicate balance? In this interactive session, we will explore techniques to ensure that we develop ISPs which reflect our residents’ goals and choices. We will discuss tips for educating and guiding our residents with regards to health needs, while still respecting their autonomy.

Learner Objectives:

- Identify interview techniques designed to encourage the resident to verbalize their goals and priorities.
- Discuss how to educate residents regarding health and care needs.
- Analyze the role of the family or guardian in developing the ISP, particularly if the family’s goals/choices do not align with the resident’s goals.
- List the key components of a resident-directed ISP.

Learner Level: Intermediate

Presenter: Amy Veldt, RN Consultant, Pinnacle Innovative Healthcare Solutions, LLC, Black Creek, WI

Thursday, May 2 - 12:30 p.m. to 1:30 p.m. (continued)



B12

The Key Components of a Premier Workplace Culture

A premier workplace culture is defined by several key components, including a strong sense of purpose, open communication, mutual trust and respect, opportunities for growth and development, and a supportive work-life balance. When these components are in place, employees feel valued, motivated, and empowered to do their best work.

Learner Objectives:

- Assess your current employee engagement programs and explore how the results of your assessment will impact your planning for the future.
- Identify key employee engagement programs to implement from pre-hire through the employee life cycle with budget considerations.
- Discuss how you can leverage technology to empower employee engagement and drive culture.

Learner Level: Intermediate

Presenter: Amber Bardon, CEO, Parasol Alliance, Lindenhurst, IL

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Lunch

Thursday, May 2, 2024 -- 11:30 a.m. to 12:30 p.m.

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Thursday, May 2, 2024 • 1:30 p.m. to 1:45 p.m.

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Thursday, May 2 - 1:45 p.m. to 2:45 p.m.



C13

AI and Aging: Navigating Tomorrow's Senior Care with Tech and Heart

Join us for a deep dive into artificial intelligence (AI) applications in senior care. This session will work to demystify the topic and provide a high level education on what AI actually is and how it is developed. We then will review real-world examples of AI in long-term care and assisted living, analyzing benefits and challenges. Attendees will gain insights into implementing AI ethically to enhance resident care and empower staff. The session equips professionals to evaluate if and how AI could improve their organization's operations and care delivery. Participants will leave with ideas to pilot AI initiatives attuned to their organization's needs.

Learner Objectives:

- Identify the various types of AI and discuss what AI actually looks like in the world today.
- Outline actual provider case studies as to how AI already has been used in the senior care field successfully.
- Discuss the challenges and barriers that exist around AI today.
- Analyze the role of AI in reducing redundant tasks and freeing up caregiver time.
- Develop two ideas to incorporate AI into your organization to improve resident care and business operations.

Learner Level: Intermediate

Presenter: Steven VanderVelde, Director of Senior Living Partnerships, Provinet Solutions, Tinley Park, IL



C14

Understanding Wisconsin's Continuum of Services from a Clinical Perspective

The level of nursing and clinical care permitted in Wisconsin long-term care facilities depends on the type: independent living (IL), residential care apartment complexes (RCACs), community-based residential facilities (CBRFs), or skilled nursing facilities (SNFs). The level of care increases from ILs to SNFs along with more stringent regulation and licensing requirements for staffing, services, and facility standards. Join us for an in-depth look at the level of nursing/clinical services allowed at each level. Learn how to identify when resident acuity is too high for a given setting and when the nursing hours exceed regulatory limits.

Learner Objectives:

- Distinguish between the care services allowed in independent living, residential care apartment complexes, community-based residential facilities, and skilled nursing facilities.
- Outline how to identify when a resident's acuity level is too high for a given setting.
- Establish a procedure for determining when the nursing hours at a facility exceed regulatory limits.

Learner Level: Intermediate

Presenter: Robert J. Lightfoot, Shareholder, Chair, Long-Term Care, Assisted Living and Independent Senior Housing Practice Group, Reinhart Boerner van Deuren, s.c., Madison, WI

Thursday, May 2 - 1:45 p.m. to 2:45 p.m. (continued)



C15

Risk Insights during a Transaction: Mergers, Acquisitions, Divestments, & Beyond

This session will cover best practices when considering major operational changes like acquiring a new facility, partnering with a management company, executing an agreement with a REIT, or divesting a service line. Topics will include due diligence, ensuring quality of care and regulatory compliance, culture impact and staff retention, information technology and HIPAA considerations, and insurance policy implications. The goal is to provide guidance on risk factors and continuity of care when navigating major organizational transactions.

Learner Objectives:

- List key risk areas during a transaction.
- Analyze the legal perspective of a change in ownership (CHOW).
- Outline solutions to implement within your community before/during/after a transaction.

Learner Level: Intermediate

Presenters: Sara Kekula, Partner, Director of Senior Living and Social Services, M3 Insurance, Madison, WI; Robert Rodè, President/Attorney, Voigt, Rodè, Boxeth & Coffin, LLC, St. Paul, MN



C16

How to Have Your Next Difficult Conversation Part 2: Case Studies & Applications

By immersing participants in real-world case studies and interactive learning experiences, this session explores the skills and scripts needed to effectively manage conflicts in the workplace. Through empathetic communication, active listening, and collaborative problem-solving, participants will learn how to transform conflicts into opportunities for growth, learning, and strengthened relationships among team members.

Learner Objectives:

- Create scripts using new words for old situations, and discuss how to apply effective tools to navigate difficult conversations with confidence.
- Discuss how to listen attentively, validate emotions, and demonstrate understanding to de-escalate tensions and foster trust.
- Demonstrate how to prioritize specific strategies that align with the level of activation, defensiveness, or apathy in any conversation, leading to better decision-making and more effective communication.

Learner Level: Basic

Presenter: Yvette Erasmus, MEd, PsyD, LP, Consulting Psychologist, Yvette Erasmus LLC, Minneapolis, MN

Thursday, May 2 - 1:45 p.m. to 2:45 p.m. (continued)



C17

Driving Occupancy in Senior Living and Assisted Living

This session will provide practical sales tips to increase occupancy at senior living and assisted living communities post-pandemic. Participants will learn proven techniques to build prospect pipelines, overcome objections, and close seemingly impossible sales. Attendees will gain actionable strategies to implement immediately at their communities and drive new resident leads to increase occupancy.

Learner Objectives:

- Recite your “elevator speech” for prospective residents demonstrating strategies to ensure you are not giving an “old folks’ home” first impression of your senior living community.
- Identify creative outreach and marketing tactics to connect with your local community.
- List tips and techniques to effectively close sales with prospective residents.

Learner Level: Intermediate

Presenter: Tia Bowe, Senior Vice President, Plante Moran Living Forward, Chicago, IL



C18

The Courage to Care through Religion, Spirituality, and Prayer

What if preventing readmissions included not only scheduling a post discharge follow up appointment with a resident’s primary care provider but also a visit from the resident’s pastor, priest, or imam? This presentation offers participants the opportunity to explore the current understanding of religion as a social determinant of health. It offers insights into and evidence of how religion and spirituality serve as a deterrent to social isolation, a way to foster and reinforce resilience in older adults, and an approach to increase resident satisfaction. The presenter will introduce participants to research exploring the types of religious and spiritual care provided in post-acute and long-term care settings in the United States and Canada. Participants will be invited to see participation in on-going spiritual and religious care research as demonstrating an organization’s commitment to the Baldrige core value of patient/person focused excellence. Join in an interactive discussion of current religious and spiritual practices and practice improvements you would like to see.

Learner Objectives:

- Analyze the protective effect of religious participation.
- List the benefits of spiritual care.
- Discuss the current research into religious and spiritual care in Wisconsin.

Learner Level: Intermediate

Presenter: Sarah McEvoy, NHA, JD, Long-Term Care Chaplain, Transforming Chaplaincy, Rush University Medical Center, Chicago, IL

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Refreshment Break

Thursday, May 2, 2024 -- 2:45 p.m. to 3:00 p.m.

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Thursday, May 2 - 3:00 p.m. to 4:00 p.m.



D19

Break – Breathe—Ignite

Join us in this session to discuss how to BREAK from your current thoughts, stress, and understanding of Culture. BREATHE in new ideas and examine human senses, surroundings, and environments. IGNITE a culture that will change your facilities, the people who live and work there, and even the world.

Learner Objectives:

- Discuss how to take the mystery out of culture.
- List ways to create and implement culture.
- Develop a plan for sustaining and living in your new culture.

Learner Level: Advanced

Presenter: Traci Jones, Vice President of Human Resources, Kalahari Resorts & Conventions, Wisconsin Dells, WI



D20

Ignite the Spark To Grow Your Clinical Team

In today's challenging job market, there is value in supporting growth within your clinical team. One avenue to facilitate this growth is a career lattice. A career lattice is a career progression pathway that allows for vertical, horizontal, and diagonal movement. When your employees can go where their strengths and interests lie, they have more control over their own career progression, thus setting them up for success.

Learner Objectives:

- Compare and contrast the career ladder and the career lattice.
- Define the value of harnessing the employee's strengths and interests to create successful transitions within the organization.
- Analyze how to implement a career lattice model.

Learner Level: Intermediate

Presenters: Lisa Gervais RN, BSN, NHA, Administrator, Woodside Senior Communities, Green Bay, WI; Jessica Atkinson, Executive Director of Campus Living, Woodside Senior Communities, Green Bay, WI

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Thursday, May 2 - 3:00 p.m. to 4:00 p.m. (continued)



D21

Having the Courage to Affiliate

A rapidly changing operating and regulatory environment has made it more important than ever for CEOs and the Board of Directors to regularly assess their organization's financial and operational performance to identify potential issues and address them proactively. These changes may include financial struggles, declining occupancy rates, and difficulty recruiting and retaining staff. For some organizations, the changes may indicate a need to explore a sale or affiliation with another organization. This session will explore how to have the courage to make an informed assessment and the process of affiliation.

Learner Objectives:

- Identify key indicators of financial and operational performance that may signal the need to explore a sale or affiliation with another organization.
- Evaluate the potential benefits and drawbacks of a sale or affiliation for your organization, considering factors such as timing, regulatory environment, and competition.
- Develop a plan for making an informed assessment of your organization's financial and operational performance, including strategies for addressing potential issues proactively and seeking the advice of legal and financial experts.

Learner Level: Advanced

Presenter: Michael Peer, Principal, CLA (CliftonLarsonAllen LLP), Milwaukee, WI



D22

Innovative Staffing Solutions

This session will focus on the innovative work of the Notre Dame Migrant Impact Network and its Innovation Partner Workforce Hope. Research strongly indicates that new sources of both skilled and unskilled workers are needed for our healthcare system, mostly caused by macro-demographic shifts in the population of the United States. The Notre Dame network currently has a focus on refugee and migrant job placement with employers in the healthcare sector, including English speaking nurses from new source countries like Kenya, and working to place the 125,000 Ukrainian refugees approved for permanent asylum in the United States.

Learner Objectives:

- Analyze the current and future landscape of sourcing skilled clinical positions from abroad.
- Discuss sourcing English speaking nurses at scale from Kenya on H1B visas.
- Discuss sourcing Ukrainian refugees for CNA and unskilled positions as permanent employees.

Learner Level: Intermediate

Presenter: James Kaiser, Chief Impact Officer, Workforce Hope, Inc., Charleston, SC

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Thursday, May 2 - 3:00 p.m. to 4:00 p.m. (continued)



D23

GUIDE: Medicare's Model for Transforming the Senior Living Approach to Memory Care

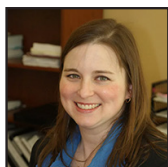
Medicare is rolling out a dementia-focused program for the first time, and senior living residents qualify. The program is called GUIDE: Guiding an Improved Dementia Experience. In this program, a medical practice administers cognitive assessments, special care plans, and dementia services to patients with cognitive impairment. The program adds Medicare-funded patient care staff to the senior living community as well. A senior living community with patients under the GUIDE program can expect to receive extensive personal care and caregiver (family) training and support. GUIDE provides a platform for the senior living community to support and engage the caregiver of the senior living with dementia, as there are several prescribed training and support regimens mandated by GUIDE.

Learner Objectives:

- Discuss how Medicare is supporting a new way of delivering care to those with cognitive impairment.
- Outline how senior living operators can mobilize GUIDE in their communities to transform the care experience for residents, families, and community care staff.
- Analyze specific benefits of the GUIDE program including a funding stream for a clinical model and respite care.

Learner Level: Intermediate

Presenter: Will Saunders, Founder and CEO, At Home Harmony, Richmond, VA



D24

Your Guide to Completing the Medicaid Application

This session will provide step-by-step guidance on completing the Medicaid application and designating an authorized representative. We will review eligibility, explore required documents, explain the application section-by-section, and cover who can serve as a representative, their powers, and how to properly fill out that section. This guidance will demystify the process of successfully completing the Medicaid application on behalf of clients.

Learner Objectives:

- Identify the required components of the Medicaid application.
- Discuss how to complete each section accurately.
- Describe the authorized representative section, including who can serve as an authorized representative and their permissions.

Learner Level: Intermediate

Presenter: Kate Schilling, Attorney, Legal Services Manager, Elder Law & Advocacy Center, Greater Wisconsin Agency on Aging Resources, Inc., Madison, WI

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Thursday, May 2, 2024 -- 5:00 p.m. to 6:30 p.m.

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Thursday, May 2, 2024 -- 5:00 p.m. to 6:30 p.m.

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present

A Special Event By Invitation Only

Meet & Greet the LeadingAge Wisconsin Diamond Sponsors



Complete details will be sent to invited guests

This conference will feature a special event (by invitation only) for our member and subscriber primary contacts to network with the 23 Diamond Sponsors of LeadingAge Wisconsin. Come meet the companies who collectively give more than \$150,000 annually to support the programs and services LeadingAge Wisconsin provides for you. These companies include:

- HealthDirect Pharmacy Services
- M3 Insurance
- Value First
- Ziegler
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Complete details will be sent to invited guests.

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The Aging Services Practice at Brown & Brown helps organizations navigate competing demands of providing quality care and the pressure to reduce costs.

Brown & Brown specializes in business insurance, risk management, and employee benefits for companies in the long-term care sector.

M3/CLA/Ziegler Spring Conference Hosted Event



Thursday, May 2, 2024

8:00 p.m. to 10:00 p.m.

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Please join M3, CLA, and Ziegler
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Friday, May 3 - 8:30 a.m. to 9:30 a.m.



E25

Strategies for Bravely Facing Medicare Advantage

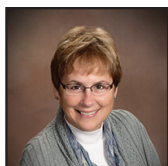
With 33 million enrollees, Medicare Advantage (MA) cannot be ignored nor is it going away. This session will focus on the basics of the MA program: trends in MA and why beneficiaries chose it, what is important to the MA plans, tools and strategies to help you approach your next contract discussion, and other considerations for participating in MA.

Learner Objectives:

- Discuss the aspects of MA that make it attractive to the Medicare beneficiary and identify who the market players are.
- Outline the decision points and considerations in contracting with managed care plans.
- List LeadingAge tools and resources available to help members as they work with managed care plans.

Learner Level: Intermediate

Presenter: Nicole O. Fallon, Vice President, Integrated Services & Managed Care, LeadingAge, Washington, D.C.



E26

Regulators, Providers and Advocates: Building Partnerships for Quality Care (Part 1)

Back by popular demand, this will be another interactive, candid discussion between a long-term care provider and Ann Angell, Director of the Bureau of Nursing Home Resident Care. As we continue to explore the mutual missions, realities, and practicalities of the responsibilities of both surveyors and providers, we will look at real-world examples of interactions between these two groups. Our goal is to better understand each other's points of view and how they shape survey outcomes and resident successes. We will discuss areas where we tend to disagree as well as opportunities for collaboration, with the aim of building trust and common ground even when we must sometimes agree to disagree. Throughout the discussion, we will keep our focus on best serving the interests and well-being of residents. (This discussion will continue in Session F32)

Learner Objectives:

- Discuss real-world examples of interactions between providers and regulators to gain mutual understanding.
- Explore how different points of view shape survey outcomes with the goal of building trust and common ground.
- List strategies to continue enhancing collaboration between providers and regulators.
- Discuss how strengthened teamwork can ensure the highest quality of care, satisfaction, and service for residents.

Learner Level: Intermediate

Facilitator: Kim Marheine, State Long-Term Care Ombudsman, State of Wisconsin Board on Aging and Long-Term Care, Madison, WI

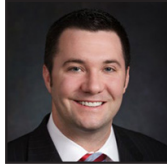
Panelists: Ann Angell, Bureau Director, Bureau of Nursing Home Resident Care, Division of Quality Assurance Madison, WI; Lynda Bogdala, Administrator, Brookside Care Center, Kenosha, WI

Friday, May 3 - 8:30 a.m. to 9:30 a.m. (continued)



E27

Streamline Your Finances (Part 1)



Effective documentation of financial processes and workflow is crucial for long-term care organizations to maintain compliance, optimize operations, and enable continuity of care. In this educational session, we will discuss best practices for documenting the end-to-end financial workflow, including accounts payable, accounts receivable, payroll, budgeting, resident trust funds, and cost reporting. Clear documentation facilitates training of new staff, ensures adherence to policies and procedures, and aids in auditing and quality control. We will provide guidelines for documenting key processes, controls, and risks at each stage of the financial workflow. Our goal is that participants will learn how to create standard operating procedures, process maps, risk matrices, and other tools to fully describe their organization's financial operations. Come with your examples and ideas and be prepared to engage in interactive discussions. Proper documentation promotes consistency, accountability, and sustainability of operations over time, through staff transitions and organizational changes. We will work together so that participants leave equipped to evaluate their existing documentation practices and develop an action plan for improvement. (This discussion will continue in Session F33)

Learner Objectives:

- Identify key financial processes and workflows that require documentation.
- Develop documentation such as process maps, flowcharts, written procedures, and checklists to standardize financial processes using clear and simple language.
- Implement a documentation maintenance system to regularly review and update materials as regulations and workflows evolve.

Learner Level: Intermediate

Presenters: Rene Eastman, Vice President of Financial & Regulatory Services, LeadingAge Wisconsin, Madison, WI; Larry Lester, Principal, Wipfli LLP, Eau Claire, WI; Rob Schlicht, Director, Wipfli LLC, Milwaukee, WI; Patrick Carroll, Senior Manager, Wipfli LLC, Milwaukee, WI; Terri Lee, Manager, Wipfli LLC, Green Bay, WI; Chad Hable, CPA, Manager, Wipfli LLC, Eau Claire, WI



E28

Leadership On Purpose (Part 1)

Do you find yourself in situations with employees and colleagues where you aren't quite sure how you got there? Do you sometimes wonder why you got into leadership or perhaps think, "It can't be this difficult"? Are you leading on purpose and with intention? Attend this workshop and give yourself the gift of time to reflect and consider ways to enhance your leadership effectiveness. (This discussion will continue in Session F34)

Learner Objectives:

- Analyze the importance of mindset, setting expectations, and holding others accountable for their choices.
- Discuss best practices related to leading on purpose.
- Identify how you can persevere and reignite the courageous leader within you.

Learner Level: Intermediate

Presenter: Shelley A. Smith, Managing Director, Leadership Development & Executive Coaching Practice, LAK Group, Brookfield, WI

Friday, May 3 - 8:30 a.m. to 9:30 a.m. (continued)



E29

Igniting Engagement: Supporting Staff in Applying Dementia Skills (Part 1)

We have the foundation. We have the tools. We know what needs to be done to provide skilled care to people living with dementia. What is the missing link when helping staff apply these tools in their daily work? In this interactive workshop, we will explore the dementia experience, practice the skills, and learn the ways to better support staff in utilizing these tools. This presentation is highly influenced by the Positive Approach to Care model. (This discussion will continue in Session F35)

Learner Objectives:

- Analyze the brain, its functions, and how people living with brain change experience the world around them.
- Demonstrate the skills to approach and communicate with people living with dementia.
- Discuss how to effectively support staff in applying these skills.

Learner Level: Intermediate

Presenters: Sheri Fairman, Owner, Dementia Care Solutions, Green Bay, WI; Audrey Linn, Consultant, Dementia Care Solutions, Fond du Lac, WI



E30

Illuminate the QAPI Program for ALL!

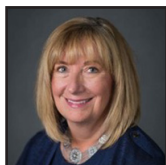
It's time to ignite and involve QAPI for all staff in the organization! This interactive and lively presentation will start with a brief regulatory overview, followed by a real-life scenario on how a facility put QAPI into action! Next, attendees will participate in a hands-on exercise. You won't want to miss this presentation!

Learner Objectives:

- Define your role in the QAPI program.
- Outline steps to a good root cause analysis investigation.
- Discuss what you learned from participating in an interactive QAPI project.

Learner Level: Intermediate

Presenters: Susan LaGrange, RN, BSN, NHA, CDONA™, FACDONA, CIMT, IP-BC™, Chief Nursing Officer Pathway Health, Lake Elmo, MN; Lisa Thomson, BA, LNHA, HSE, CIMT, Chief Operating Officer, Pathway Health, Lake Elmo, MN



Continuing Education

LeadingAge Wisconsin has requested this educational program, including the pre-conference workshops and the conference sessions, be approved for up to ten (10) hours of continuing education for nursing home administrators.

Continuing education credits also have been requested from the following professional organizations:

- National Certification Council for Activity Professionals
- Certifying Board for Dietary Managers
- Wisconsin Dietetic Association's Commission on Dietetic Registration
- Wisconsin Chapter of the National Association of Social Workers

You may pick up your CEU form at the Attendee Lounge. Listen for a verification code to be announced during each session you attend, and enter the codes on your CEU form. Please remember to submit your CEU form to the LeadingAge Wisconsin staff before you leave the conference.

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Investment advisory services are offered through CliftonLarsonAllen Wealth Advisors, LLC, an SEC-registered investment advisor.

Friday, May 3 - 9:45 a.m. to 10:45 a.m.



F31

Changing Medicare Advantage Policy and How Providers Can Influence It

Medicare Advantage (MA) is here to stay, but policymakers are beginning to recognize that some changes are needed. Come learn about the recent MA rules and legislation covering prior authorizations, coverage determinations, information sharing, and the use of artificial intelligence. We will provide the latest information from CMS about how the rules apply in post-acute care, the LeadingAge MA advocacy efforts, and how we can work together to ensure the plans comply with the rules.

Learner Objectives:

- Outline LeadingAge Congressional and regulatory priorities related to Medicare Advantage and the latest actions policymakers have taken to address them.
- Analyze the new MA rules impacting prior authorizations, coverage determinations, and the use of artificial intelligence, along with any new guidance from CMS on how plans should apply these rules in post-acute care settings and the goals CMS is trying to achieve.
- Discuss the role LeadingAge members can play in ensuring the new rules are enforced and that beneficiaries get the care they need.

Learner Level: Intermediate

Presenter: Nicole O. Fallon, Vice President, Integrated Services & Managed Care, LeadingAge, Washington, D.C.



F32

Regulators, Providers and Advocates: Building Partnerships for Quality Care (Part 2)

Discussion will continue from Session E26

Learner Level: Intermediate



Facilitator: Kim Marheine, State Long-Term Care Ombudsman, State of Wisconsin Board on Aging and Long-Term Care, Madison, WI

Panelists: Ann Angell, Bureau Director, Bureau of Nursing Home Resident Care, Division of Quality Assurance, Madison, WI; Lynda Bogdala, Administrator, Brookside Care Center, Kenosha, WI



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Refreshment Break

Friday, May 3, 2024 • 9:30 a.m. to 9:45 a.m.

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Friday, May 3 - 9:45 a.m. to 10:45 a.m. (continued)

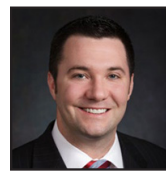
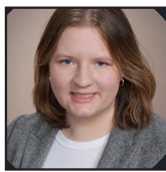
F33

Streamline Your Finances (Part 2)

Discussion will continue from Session E27

Learner Level: Intermediate

Presenters: Rene Eastman, Vice President of Financial & Regulatory Services, LeadingAge Wisconsin, Madison, WI; Larry Lester, Principal, Wipfli LLP, Eau Claire, WI; Rob Schlicht, Director, Wipfli LLC, Milwaukee, WI; Patrick Carroll, Senior Manager, Wipfli LLC, Milwaukee, WI; Terri Lee, Manager, Wipfli LLC, Green Bay, WI; Chad Hable, CPA, Manager, Wipfli LLC, Eau Claire, WI



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Friday, May 3 - 9:45 a.m. to 10:45 a.m. (continued)



F34

Leadership On Purpose (Part 2)

Discussion will continue from Session E28.

Learner Level: Intermediate

Presenter: Shelley A. Smith, Managing Director, Leadership Development & Executive Coaching Practice, LAK Group, Brookfield, WI



F35

Igniting Engagement: Supporting Staff in Applying Dementia Skills (Part 2)

Discussion will continue from Session E29.

Learner Level: Intermediate

Presenter: Sheri Fairman, Owner, Dementia Care Solutions, Green Bay, WI; Audrey Linn, Consultant, Dementia Care Solutions, Fond du Lac, WI



F36

Corporate Compliance: Reigniting the Conversation

As organizations continue to navigate the post-COVID landscape, Corporate Compliance and Ethics Programs are a great place to revisit and refresh. This session will focus on risk considerations and best practices when reviewing an organization's Corporate Compliance and Ethics Program including: Corporate Compliance regulatory requirements, Corporate Compliance versus QAPI, and educating and engaging staff in the Corporate Compliance program.

Learner Objectives:

- List the key components of Corporate Compliance and discuss the importance of an effective program.
- Compare and contrast Corporate Compliance and QAPI and discuss incorporating both effectively.
- Identify solutions to reinvigorate the conversation and implementation of Corporate Compliance.

Learner Level: Intermediate

Presenter: Talia Pletcher, RNHA, LALD, Risk Manager, Senior Living & Social Services Practice, Healthcare Practice, M3 Insurance, Madison, WI

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