



Imagine the Possibilities

2019 Fall Conference  
& 39th Annual Exhibitors Forum  
KI Convention Center  
Green Bay, Wisconsin  
October 2-4, 2019

LeadingAge™  
Wisconsin

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As a leader, you solve problems. But if that's all you do, at best all you get for the effort is caught up. For your work to have a lasting impact, you must focus on possibilities. That way, you are creating the future rather than mending the past. Through possibility thinking, you see energizing options before your competitors do. You blaze a trail by turning transformative new ideas into profitable realities. (Ian Percy)

### Imagine the Possibilities

Join us  
**October 2-4, 2019**  
**KI Convention Center**  
**333 Main Street**  
**Green Bay, Wisconsin**

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. The conference will feature professional network meetings, two pre-conference workshops with Teepa Snow, a motivational keynote address, 36 educational sessions, an evening of entertainment featuring comedy and music, and our 39th Annual Exhibitors Forum.

### Registration & Fees

To register for the LeadingAge Wisconsin 2019 Fall Conference and 39th Annual Exhibitors Forum, complete the online registration form at: <https://cvent.me/7rk9Q>

#### LeadingAge Wisconsin Members/Subscribers

<b>Oct. 2 Pre-conference</b>	<b>\$ 30 per person</b>
<b>Oct. 3-4</b>	<b>\$275 per person</b>
<b>Oct. 3 only</b>	<b>\$200 per person</b>
<b>Oct. 4 only</b>	<b>\$125 per person</b>

#### Non-Members of LeadingAge Wisconsin

<b>Oct. 2 Pre-conference</b>	<b>\$ 50 per person</b>
<b>Oct. 3-4</b>	<b>\$300 per person</b>
<b>Oct. 3 only</b>	<b>\$225 per person</b>
<b>Oct. 4 only</b>	<b>\$150 per person</b>

If you complete your online registration after **September 11, 2019**, you must pay a late fee, which will increase each of the above listed fees, (an increase of \$10 per person for the pre-conference and an increase of \$25 for the conference.)

The conference registration fee includes the educational sessions, admission to the 39th Annual Exhibitors Forum, the Welcoming Reception, the Evening of Entertainment, access to the conference app, name badges, break refreshments, and meals listed in this program booklet.

### Location

The LeadingAge Wisconsin 2019 Fall Conference and 39th Annual Exhibitors Forum will be held October 2-4, 2019 at the KI Convention Center in Green Bay, Wisconsin. LeadingAge Wisconsin has reserved a block of sleeping rooms at six nearby hotels. Please direct all room reservation requests and related questions to the hotel of your choice. Remember to indicate you are attending the conference of LeadingAge Wisconsin and you wish a room within the LeadingAge Wisconsin block. Overnight accommodations are available on a first-come-first-served basis at each of the hotels.

#### Hyatt Regency

(Connected to the KI Convention Center)  
 333 Main Street  
 Green Bay, WI 54301  
 To Reserve a Room, Click This Link: <https://www.hyatt.com/en-US/group-booking/GRBRG/G-LA19>  
 Room rates begin at \$110

#### Hampton Inn

(Connected to the KI Convention Center)  
 201 Main Street  
 Green Bay, WI 54301  
 920-437-5900  
 Room rates begin at \$129

#### Hotel Northland

(one-half mile to the KI Convention Center)  
 304 North Adams Street  
 Green Bay, WI 54301  
 920-393-7499  
 Room rates begin at \$119

#### Hawthorn Suites by Wyndham

(5 minutes from the KI Convention Center)  
 335 W. St. Joseph Street  
 Green Bay, WI 54301  
 920-435-2222  
 Room rates begin at \$99

#### Quality Inn and Suites

(6 minutes from the KI Convention Center)  
 331 South Washington Street  
 Green Bay, WI 54301  
 920-437-8771  
 Room rates begin at \$89

#### Tundra Lodge Resort

(9 minutes from the KI Convention Center)  
 865 Lombardi Avenue  
 Green Bay, WI 54304  
 920-405-8700  
 Room rates begin at \$99

Please make sure you ask about the cancellation policies when you book your room. As time

moves on, rooms will rapidly disappear. Please book your 2019 Fall Conference overnight accommodations now.

### Continuing Education

LeadingAge Wisconsin has requested this educational program, including the pre-conference workshops with Teepa Snow and the conference sessions, be approved for up to thirteen and one-half (13.5) hours of continuing education for nursing home administrators. Our request has been submitted (but not yet approved) to the NAB/NCERS. Call LeadingAge Wisconsin at 608-255-7060 for further information.

Continuing education credit also will be available through the following professional organizations:

- National Certification Council for Activity Professionals
- Certifying Board for Dietary Managers
- Wisconsin Dietetic Association's Commission on Dietetic Registration

### What to Wear

We encourage you to dress casually for all LeadingAge Wisconsin convention activities.

The KI Convention Center 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.

### For Additional Information

If you have any questions or if you would like additional information related to any aspect of the LeadingAge Wisconsin 2019 Fall Conference & 39th Annual Exhibitors Forum, please contact:

**LeadingAge Wisconsin**  
**204 South Hamilton Street**  
**Madison WI 53703**  
**608-255-7060**  
**[www.LeadinAgeWI.org](http://www.LeadinAgeWI.org)**  
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## Schedule at a Glance

### Wednesday, October 2, 2019

- 8:00 a.m. to 5:00 p.m.**      **Registration Open**
- 9:15 a.m. to 11:15 a.m.**      **LeadingChoice Network Annual Meeting** (*LeadingChoice Network members only*)
- 9:15 a.m. to 11:30 a.m.**      **Pre-conference Workshop** (details on pages 6) (sponsored by Marsh & McLennan Agency)  
(with a 15-minute break)      **PC1 - Imagining a Positive Approach to Dementia Care**
- 10:30 a.m. to 12:00 noon**      **Network Meetings**  
There will be networking meetings for: Echelon participants, clinical professionals, financial professionals, fund raising professionals, medical records professionals, and foodservice professionals.
- 11:30 a.m. to 12:50 p.m.**      **LeadingAge Wisconsin Board of Directors Meeting**
- 1:00 p.m. to 4:15 p.m.**      **Pre-conference Workshop** (details on page 6) (sponsored by Marsh & McLennan Agency)  
(with a 15-minute break)      **PC2 - Coping with Challenging Situations in Dementia Care**
- 1:00 p.m. to 4:15 p.m.**      **LeadingAge 2019 Town Hall Conversation** (details on page 7)  
(with a 15-minute break)      **Focus on the Future**
- 5:00 p.m. to 8:00 p.m.**      **Welcoming Reception** (sponsored by M3 Insurance and BB&T Capital Markets)

### Thursday, October 3, 2019

- 7:00 a.m. to 5:00 p.m.**      **Registration Open**
- 6:45 a.m. to 8:00 a.m.**      **Hyatt Regency Breakfast Buffet**
- 8:00 a.m. to 9:15 a.m.**      **Conference Opening & Keynote Address** (details on page 11)  
*A World of Possibilities Is Waiting for You and Your Organization...But Not Patiently!*  
(sponsored by Ziegler)
- 9:15 a.m. to 9:30 a.m.**      **Break** (sponsored by Wisconsin Health & Education Facilities Authority - WHEFA)
- 9:30 a.m. to 10:30 a.m.**      **Six Simultaneous Breakout Sessions** (details on pages 12-13)  
**A01 - You've Got This! Providing Meaningful Aging Services in a Changing World**  
**A02 - Imagine Going to Bed on November 27, 2019 - and Feeling READY for Phase 3**  
**A03 - Professional Boundaries in Long Term Care** (Part 1)  
**A04 - Workplace Violence and Employer Responsibility in Healthcare**  
**A05 - Future of Assisted Living? Let's Imagine the Possibilities from Two Perspectives**  
-- Regulation and Medicaid  
**A06 - Closing with Confidence**
- 10:30 a.m. to 10:45 a.m.**      **Break** (sponsored by Value First)
- 10:45 a.m. to 11:45 a.m.**      **Six Simultaneous Breakout Sessions** (details on pages 14-15)  
**B07 - Guiding Your Board to Imagine the Possibilities**  
**B08 - PDPM: It Has Only Been 3 Days**  
**B09 - Professional Boundaries in Long Term Care** (Part 2)  
**B10 - When the Patient Is Not Always Right: Requests for Race-specific Caregivers**  
**B11 - Imagine the Possibilities with a Great Leader**  
**B12 - Closing with Confidence: In Person vs. Over the Phone** (Role Playing Scenario)



- 11:45 a.m. to 2:15 p.m.** Lunch at the 39th Annual Exhibitors Forum (details on page 16)
- 2:15 p.m. to 3:30 p.m.** **Six Simultaneous Breakout Sessions** (details on pages 18-19)  
**C13 - Building Scale and Sophistication through Strategic Relationships**  
**C14 - A Perfect Care Transition: Imagine the Possibilities**  
**C15 - Cultivating Competence and Compassion in Dementia Care: It's More Than What You Know, It's How You Show It**  
**C16 - Employee Retaliation for Whistleblowing**  
**C17 - Advanced Resident Privacy: Considerations in the Age of Smart Devices and Other Electronic Traps**  
**C18 - No Excuses: Know Your Residents and How to Connect with Them** (Part 1)
- 3:30 p.m. to 3:45 p.m.** Break (sponsored by Community Living Solutions)
- 3:45 p.m. to 5:00 p.m.** **Six Simultaneous Breakout Sessions** (details on pages 20-21)  
**D19 - Imagine the Possibilities for New Campus Developments**  
**D20 - Imagine the Possibilities: Maximizing the Power of the MDS in Your Organization**  
**D21 - Ingredients for Success: Culture Change in Dining**  
**D22 - Light Duty Requests**  
**D23 - Protecting Your Organization Against Litigation Possibilities**  
**D24 - No Excuses: Know Your Residents and How to Connect with Them** (Part 2)
- 5:00 p.m. to 6:30 p.m.** Hospitality Reception at the 37th Annual Exhibitors Forum (details on page 16) (sponsored by Hoffman Planning, Design & Construction and CliftonLarsonAllen)
- 5:30 p.m. to 6:30 p.m.** Exhibitor Door Prize Drawings (details on page 16)
- 6:30 p.m. to 11:00 p.m.** Evening of Entertainment (details on page 22-23) (sponsored by Compeer Financial, Specialized Medical Services, CliftonLarsonAllen, and Martin Bros. Distributing Co., Inc.)

## Friday, October 4, 2019

- 6:45 a.m. to 11:30 a.m.** Registration Open
- 6:45 a.m. to 8:15 a.m.** Hyatt Regency Breakfast Buffet
- 8:15 a.m. to 9:45 a.m.** **Six Simultaneous Breakout Sessions** (details on pages 24-25)  
**E25 - New Concept! New Development! New Lifestyle! Senior Housing Cooperatives!**  
**E26 - Creating Stronger Organizations through Aggressive Growth Strategies** (Part 1)  
**E27 - Skeletons in the Closet: The Impact of Past Trauma on People Living with Dementia and Their Care Partners** (Part 1)  
**E28 - Imagine a Workplace Free from Harassment, Discrimination, and Bullying**  
**E29 - A Night and Day Difference**  
**E30 - How to Learn What People Say about Your Culture**
- 9:45 a.m. to 10:00 a.m.** Break (sponsored by Select Rehabilitation)
- 10:00 a.m. to 11:30 a.m.** **Six Simultaneous Breakout Sessions** (details on pages 26-27)  
**F31 - Imagine the Future of Wisconsin Skilled Nursing**  
**F32 - From Strategy to Reality: Exploring Successful Project Development & Design Solutions** (Part 2)  
**F33 - Skeletons in the Closet: The Impact of Past Trauma on People Living with Dementia and Their Care Partners** (Part 2)  
**F34 - "I Love My Job" -- The Workplace as a Safe Place and an Opportunity for Marketing & Branding**  
**F35 - Two CNAs and a Gait Belt Walk Into a Room...Imagine the Possibilities**  
**F36 - Hands-on Workshop: Developing a Culture of Listening**

## Wednesday, October 2

### Pre-conference Workshops Featuring Teepa Snow

#### PC1

**9:15 a.m. to 11:30 a.m.** -- (with a 15-minute break from 10:15 a.m. to 10:30 a.m.)

#### *Imagining a Positive Approach to Dementia Care*

Situations in dementia care often can be challenging, but Teepa's approach is here to help. The goal of this interactive session is to help care partners manage their own behaviors for improved interactions and to provide practical knowledge, skills, and attitudes that will change daily outcomes of dementia care.

- Identify the important role that words and actions play in the behavior and responses of people living with dementia.
- Describe several of the critical factors for optimizing positive interactions.
- Demonstrate techniques that improve the potential for successful communication.

Learner Level: Intermediate

Presenter: Teepa Snow, MS, OTR/L, FAOTA, Positive Approach to Care, Efland, NC

#### PC2

**1:00 p.m. to 4:15 p.m.** -- (with a 15-minute break from 2:30 p.m. to 2:45 p.m.)

#### *Coping with Challenging Situations in Dementia Care*

In this session, care partners will be introduced to the "six pieces of the puzzle" that may be used to help determine contributing factors to challenging situations or "behaviors." This problem-solving approach will be presented to help learners reduce the intensity, frequency, or occurrence of challenges.

- List the six factors that may be used to determine what may be contributing to challenging situations.
- Discuss the value of knowing the person and their history in effective communication efforts.
- Identify effective verbal and physical techniques to increase the probability of positive interactions.

Learner Level: Intermediate

Presenter: Teepa Snow, MS, OTR/L, FAOTA, Positive Approach to Care, Efland, NC



#### **Important Note regarding Registration for the Pre-conference Workshops featuring Teepa Snow**

There is a per person fee (\$30 for members/subscribers; \$50 for non-members if you register by September 11, 2019) to register for one or both of the pre-conference workshops featuring Teepa Snow. Your pre-conference registration fee includes lunch. Please remember, there is a separate (per person) registration fee for the 2019 Fall Conference.

## Wednesday, October 2 - 1:00 p.m. to 4:15 p.m. (with a 15-minute break from 2:30 p.m. to 2:45 p.m.)

**THM**

### LeadingAge 2019 Town Hall Conversation: *Focus on the Future*

The LeadingAge policy setting process begins with you! Join us for Wisconsin's Town Hall Conversation in conjunction with LeadingAge national. This is your opportunity to advise the staff and board of LeadingAge national about the challenges and barriers you face as an aging services provider. What works? What is not working? Do you have any federal policy-related ideas for solutions? The issues and ideas you share will be combined with issues identified in Town Hall Conversations across the country and shaped into the LeadingAge national policy priorities and activities in Washington during the coming year and beyond. The input provided during last year's Town Hall Conversation process directly influenced the LeadingAge policy priorities for 2019. This is not just for "policy people." We invite and encourage all members to attend and share their experiences.

- Outline how the new LeadingAge national policy setting process will encourage engagement, interaction, and transparency when determining LeadingAge national public policy goals.
- Identify emerging issues for long-term care providers and discuss their impact on the future of aging services across the country.
- Discuss how your participation and discussions will directly influence the 2020 LeadingAge policy priorities and help form LeadingAge strategy for 2020 and beyond.

Learner Level: Intermediate

#### Presenters

Facilitator: Sondra Norder, NHA, JD, President & CEO, St. Paul Elder Services, Inc., Kaukauna, WI

Convener: John Sauer, President & CEO, LeadingAge Wisconsin, Madison, WI

LeadingAge National Staff: Ruth Katz, Senior Vice President for Public Policy, LeadingAge, Washington DC

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#### Pre-conference Workshops PC1 and PC2 featuring Teepa Snow

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Wednesday, October 2, 2019 -- 5:00 p.m. to 8:00 p.m.

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Welcoming Reception Food**

Wednesday, October 2, 2019 -- 5:00 p.m. to 8:00 p.m.

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**Diamond Conference Sponsor****Keynote Address Featuring Ian Percy**

Thursday, October 3, 2019 -- 8:00 a.m. to 9:15 a.m.

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## Thursday, October 3 - 8:00 a.m. to 9:15 a.m.

### KEYNOTE *A World of Possibilities Is Waiting for You and Your Organization...But Not Patiently!*

The innovation that will totally redefine senior living 50 years from now already exists. We just don't know where. It may well be in the mind and imagination of a LeadingAge Wisconsin 2019 Fall Conference participant! To find out, we need a new understanding of how possibilities work in the universe. Once we learn to see and act on what is truly possible, we will significantly change the way we all live...for our residents and ourselves.

- Define possibility thinking.
- Analyze how you can envision bold "what-ifs" and lead your organization to bring them to fruition by understanding the dynamics of possibility thinking.
- Discuss sources of game-changing ideas.

Learner Level: Intermediate

Presenter: Ian Percy, President, The Ian Percy Corporation, Scottsdale, AZ



#### Diamond Conference Sponsor Refreshment Break

Thursday, October 3, 2019 -- 9:15 a.m. to 9:30 a.m.

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## Thursday, October 3 - 9:30 a.m. to 10:30 a.m.

### A01

#### ***You've Got This! Providing Meaningful Aging Services in a Changing World***

We serve an aging population, with few resources for retirement, living into their 90s. What does a good life look like for our consumers? How can we -- the experts in senior living and long-term care -- use our creativity, passion, and business savvy to meet their health and support needs and enable them to have the lives they envision? In a changing political, economic, technology, and cultural context, how are we rising to the challenge?

- Analyze trends across the United States and around the world along economic, political, technology, and demographic lines and discuss what the trends mean for aging services.
- Discuss how aging Baby Boomers imagine their quality of life if they become disabled or experience dementia in their older years.
- Explore how savvy LeadingAge members across the country are tailoring their business lines and offerings to these trends and visions and how policy makers can help them.

Learner Level: Intermediate

Presenter: Ruth Katz, Senior Vice President for Public Policy, LeadingAge, Washington DC

### A02

#### ***Imagine Going to Bed on November 27, 2019 – and Feeling READY for Phase 3***

This session will present the surveyors' perspective for what "overall readiness" looks like for the implementation of Phase 3 of the Mega Rule.

- Outline what surveyors will be looking for after Phase 3 of the Mega Rule is implemented, including the areas of facility assessment, trauma informed care, and staff competencies.
- Identify assignments to complete now to help you sleep better on November 27, 2019.

Learner Level: Intermediate

Presenters: Pat Virnig, RN, Director, Bureau of Nursing Home Resident Care, Division of Quality Assurance, Madison, WI; Ann Angell, RN, Deputy Bureau Director, Bureau of Nursing Home Resident Care, Division of Quality Assurance, Madison, WI

### A03

#### ***Professional Boundaries in Long-Term Care (Part 1)***

This highly interactive two-part session will present an overview of ethical issues that develop when providers and recipients have difficulty recognizing professional boundaries. By examining real ethics consultation cases, participants will explore key concepts and generate a better understanding of the relationship between healthcare personnel and the individuals whom they serve. (This discussion will continue in Session B09.)

- Define professional boundaries and dual relationships in an ethically useful way.
- Explore cases where boundary crossings are difficult to identify or avoid.
- Demonstrate tools and policies that can be of use in avoiding inappropriate boundary crossings.

Learner Level: Intermediate

Presenter: Michael A. Gillette, PhD, President, Bioethical Services of Virginia, Inc., Lynchburg, VA



## Thursday, October 3 - 9:30 a.m. to 10:30 a.m. (continued)

### A04

#### ***Workplace Violence and Employer Responsibility in Healthcare***

Acts of violence in the workplace are the third-leading cause of fatal occupational injuries in the U.S., with higher rates of violence in the healthcare industry than the rest of the private sector. Imagine reducing violence and injuries through a well-crafted workplace violence prevention program guided by OSHA standards.

- Identify risk factors for workplace violence.
- List effective strategies for reducing incidents of violence in healthcare settings.
- Outline state-specific approaches to workplace violence.

Learner Level: Basic/Intermediate

Presenter: Leslie B. Elkins, Partner, Kramer Elkins & Watt, LLC, Madison, WI

### A05

#### ***Future of Assisted Living? Let's Imagine the Possibilities from Two Perspectives -- Regulation and Medicaid***

What will the future of assisted living look like? Please come to this interactive session to image the possibilities of a future assisted living from two different perspectives. What does the future hold regarding regulations and oversight? What does the future hold from a Family Care and Medicaid perspective?

- From the regulatory perspective, discuss the future possibilities related to changes in regulations, trends, impact of assisted living in relation to nursing home downsizing, and how quality can improve compliance.
- From the Medicaid perspective, explore the future possibilities related to trends with statewide Family Care, pay for performance, how MCOs are using WCCEAL, and other strategies to improve quality.
- Formulate answers to your questions regarding the possibilities of a future assisted living through two different lenses that both are focused on quality for the individual assisted living resident/tenant.

Learner Level: Intermediate

Presenters: Kevin Coughlin, Policy Initiatives Advisor-Executive, Division of Medicaid Services, Madison, WI; Alfred Johnson, Director of the Bureau of Assisted Living, Division of Quality Assurance, Madison, WI

### A06

#### ***Closing with Confidence***

Closing a sale requires trust -- not only trusting your own abilities but, just as importantly, is trust in your closing processes. Closing a sale is an integrate process that requires a connection, a value, and conviction. Join this first *Closing with Confidence* session, presented by Dana Asche with Bild & Co to learn more! (This discussion will continue in Session B12.)

- Explore the connection between trust and closing.
- Outline a process for building value and connecting.

Learner Level: Intermediate

Presenter: Dana Asche, Director of Training, Bild & Co, Raymond, MN

## Thursday, October 3 - 10:45 a.m. to 11:45 a.m.

### **B07** *Guiding Your Board to Imagine the Possibilities*

Leading employees through significant changes within your organization can be challenging, but how does one go about leading the board, who may only be exposed to the changing healthcare landscape through the monthly / quarterly meetings you hold? This session will help managers at all levels to guide the board toward receptivity to significant changes in organizational operations and strategic direction.

- Discuss how to determine if your board is ready for some “risky business.”
- Map your course for change with checkpoints and marked hazards.
- Outline steps related to communication and credit once you have accomplished your mission.

Learner Level: Intermediate

Presenters: Mary Ann Drescher, President, Attic Angel Community, Madison, WI; Dennis Ferger, CEO/Administrator, Clement Manor, Inc., Greenfield, WI

### **B08** *PDPM: It Has Only Been 3 Days*

This presentation will be a group discussion of PDPM implementation and challenges. Although you will not see your first Medicare payments for an additional six to eight weeks, there are many questions and varying implementation strategies. Learn from therapy, nursing, and billing experts as they discuss implementation “speed bumps” and challenges.

- Discuss the role of Section GG and the IPA assessment.
- Outline the role of SLP in PDPM.
- Identify challenges with billing due to PDPM and Medicare Advantage.
- State the importance of the Triple Check process with PDPM.

Learner Level: Intermediate

Presenters: Kate Brewer, PT, MBA, RAC-CT, President, Greenfield Rehabilitation Agency, Brookfield, WI; Theresa Lang, RN, BSN, WCC, Regional Clinical Reimbursement Specialist, Grace Lutheran Communities, Eau Claire, WI; Mary Petersen, Vice President of Financial Services, Specialized Medical Services, Inc., Milwaukee, WI

### **B09** *Professional Boundaries in Long-Term Care (Part 2)*

Discussion will continue from Session A03.

- Define professional boundaries and dual relationships in an ethically useful way.
- Explore cases where boundary crossings are difficult to identify or avoid.
- Demonstrate tools and policies that can be of use in avoiding inappropriate boundary crossings.

Learner Level: Intermediate

Presenter: Michael A. Gillette, PhD, President, Bioethical Services of Virginia, Inc., Lynchburg, VA

## Thursday, October 3 - 10:45 a.m. to 11:45 a.m. (continued)

### B10

#### *When the Patient Is Not Always Right: Requests for Race-specific Caregivers*

Participants in this session will analyze a case study of patient requests for race-specific caregivers and employer responses. Discussion will focus on recognizing the challenges in respecting a patient's right to access healthcare providers of their choosing while avoiding employment discrimination.

- Develop a workplace policy to handle race-based requests.
- Discuss how to respond to patient threats for race-specific caregivers.
- Explore whether there are any liability concerns related to accommodating a gender-specific caregiver preference.

Learner Level: Intermediate

Presenter: Leslie B. Elkins, Partner, Kramer Elkins & Watt, LLC, Madison, WI

### B11

#### *Imagine the Possibilities with a Great Leader*

One of the key elements to ensure success in managing your assisted living community is choosing a great leader, someone who will inspire confidence with the residents, tenants, and families, as well as encourage high level performance from the staff. Successful leaders come with a variety of educational levels and experiences and there is not "one right answer" as to who should fill that crucial role. Come and join in the discussion in this highly interactive session as we explore the realities and practicalities of choosing and nurturing a talented leader.

- Discuss the key attributes and talents of a great leader.
- Discuss how to grow and nurture talented leaders for long-term success.
- Examine how the projected trends in assisted living in Wisconsin will impact the role of the manager in the organization.

Learner Level: Intermediate

Presenter: Amy Ruedinger, CEO & Founder, Pinnacle Innovative Healthcare Solutions, Black Creek, WI

### B12

#### *Closing with Confidence: In Person vs. Over the Phone* (Role Playing Scenario)

(Discussion will continue from Session A06.) This second session of *Closing with Confidence* will dive deeper into the nuts and bolts of the close. Participants will tackle the question of In Person vs. Over the Phone closing and will engage in interactive role playing opportunities to fine tune and master your closing strategies so that you too can *Close with Confidence*.

- Outline the steps involved in successfully closing the sale.
- Identify the skills you need to develop to be able to close with confidence.

Learner Level: Intermediate

Presenter: Dana Asche, Director of Training, Bild & Co, Raymond, MN

## Thursday, October 3 11:45 a.m. to 2:15 p.m.

**11:45 a.m. to 2:15 p.m.**

### **Lunch at the 39th Annual Exhibitors Forum**

Every day, all day long, you encounter great challenges, wonderful opportunities, exciting trends, and unprecedented innovations in your quest to imagine the possibilities. To maximize your ability to serve your residents and tenants, it is important to have allies nearby and resources ready to equip you with the information, tools, and products you will need to fulfill your mission. Welcome to our 39th Annual Exhibitors Forum, a showcase of products and services designed to enhance the quality of care and services you provide.

A variety of food stations will be available.

## Thursday, October 3 5:00 p.m. to 6:30 p.m.

**5:00 p.m. to 6:30 p.m.**

### **Reception at the 39th Annual Exhibitors Forum**

Come visit with nearly 150 vendors to continue learning about products and services available to help you provide better services for better aging.

Remember to register for the exhibitor sponsored door prizes.

The Parade of Prizes will begin promptly at 5:30 p.m. Walk with us through the tradeshow hall as exhibitors award exciting prizes to conference attendees. Listen carefully for your name to be called. Many companies require the winner to be present to win.

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Thursday, October 3, 2019 -- 10:30 a.m. to 10:45 a.m.

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## Thursday, October 3 - 2:15 p.m. to 3:30 p.m.

### **C13** *Building Scale and Sophistication through Strategic Relationships*

The over-arching premise of this session is that in partnership with one another, in whatever form that may take, we often can accomplish more than if we were to continue to grow and advance independently. In following one organization's journey to pursue partnerships, joint ventures, and model for growth, you will learn the value of continuously growing and looking for ways to partner and evolve. This is particularly true for single-site providers who need to look for avenues to enhance scale and sophistication.

- Review the market disruptors and innovations prompting long-term care providers to pursue joint ventures.
- Discuss the wide range of strategic relationships aging services providers can leverage to build capacity for growth and mission advancement.
- Explore various growth strategies designed to position organizations to better compete in their local marketplace.

Learner Level: Advanced

Presenter: Ken Arneson, President/CEO, Evergreen Retirement Community, Inc., Oshkosh, WI

### **C14** *A Perfect Care Transition: Imagine the Possibilities*

This session will address care transitions between the hospital and post-acute facility, including skilled nursing facilities and assisted living. The session will describe the Assisted Living and Hospital Interface Guide, the blue envelope transfer process, and other tools to facilitate care transitions.

- Analyze the importance of coordinated care transitions to patients and providers.
- List tools that have been developed to facilitate care transitions between hospitals and post-acute care providers.
- Discuss how advance care planning and post-transition follow-up can improve the patient's care experience.

Learner Level: Intermediate

Presenters: Laura Rose, JD, Vice President, Policy Development, Wisconsin Hospital Association, Madison, WI; Maria Brenny-Fitzpatrick, DNP, RN, FNP-C, GNP-BC, Director, Transitional Care and Post-Acute Services, UW Health, Madison, WI

### **C15** *Cultivating Competence and Compassion in Dementia Care: It's More Than What You Know; It's How You Show It*

As dementia continues to rise in epidemic numbers, so too does the challenge of providing competent care to those most impacted. It is, therefore, vital to understand the implications this disease has on grief, loss, and relationships and how to compassionately support people living with dementia and their care partners.

- Discuss the concepts of anticipatory grief and ambiguous loss and how they are relevant to working with people living with dementia and their families.
- Analyze the profound impact that dementia has on relationships and ways to support care partners around these evolving and stressful changes.
- Explore how palliative care can play a key role in supporting people living with dementia and their families in the community.

Learner Level: Intermediate

Presenter: Kay Adams, LCSW, Founder of Compassion Works, LLC, Wheat Ridge, CO

## Thursday, October 3 - 2:15 p.m. to 3:30 p.m. (continued)

### **C16** *Employee Retaliation for Whistleblowing*

This session will present an overview of OSHA protection and Wisconsin state law for employee reporting of violations of law or quality of healthcare services.

- Analyze adverse actions that might amount to retaliation.
- Discuss proper response to discovery of employee complaint.
- Establish a workplace environment where employees feel comfortable voicing concerns.

Learner Level: Intermediate

Presenter: Jessica M. Kramer, Managing Partner of Kramer Elkins & Watt, LLC, Madison, WI

### **C17** *Advanced Resident Privacy: Considerations in the Age of Smart Devices and Other Electronic Traps*

The law protects resident privacy rights in a variety of ways. This session will provide a brief overview of state and federal laws protecting the rights of residents before covering more advanced applications of these privacy rights. In particular, the speakers will detail various situations that implicate resident privacy rights such as the introduction of smart devices into the facility and care staff using smart phones and other electronic devices. Finally, the speakers will explore means of mitigating risks posed in these situations while promoting resident autonomy.

- Outline the state and federal privacy laws and regulations that protect residents.
- Identify situations in which a resident's privacy rights might be violated.
- List strategies to efficiently minimize the risks posed in various situations.

Learner Level: Intermediate

Presenters: Daniel Balk, Attorney, von Briesen & Roper, s.c., Milwaukee, WI; Maureen Molony, Attorney, von Briesen & Roper, s.c., Madison, WI

### **C18** *No Excuses: Know Your Residents and How to Connect with Them* (Part 1)

Consumers are increasingly shopping for an experience that is very different from the traditional continuing care model. As preferences of older adults continue to change, their desire for a more socially active and purpose-driven existence is re-defining the quality of life that providers must provide to remain competitive. (This discussion will continue in Session D24.)

- Discuss the changing desires and wants of the future consumer.
- Outline the changes needed in how we sell to and attract tomorrow's resident.
- Explore marketing and sales strategies that successful organizations implement on a consistent basis.

Learner Level: Intermediate

Presenter: Jamie Timoteo, Senior Vice President, Plante Moran Living Forward, Chicago, IL; Kyle Schnurbusch, Partner/Content, OrgStory, Chicago, IL

## Thursday, October 3 - 3:45 p.m. to 5:00 p.m.

### **D19** *Imagine the Possibilities for New Campus Developments*

Envision a new feature where senior living and care is simultaneously high end and affordable, where seniors live in harmony with nature, and where senior services and supports are designed to honor the spirit of the small community where they are built. Follow the development of a new senior living campus from idea inception through market research, from planning and development to design, financing, and construction. Hear first-hand from the owners, design/builder, and management of the new campus in town as to what they included and why, what they are doing and why, and how the financial piece works.

- List important considerations in the development of a new senior living campus.
- Analyze the realities and practicalities of a senior living campus that is simultaneously high end and affordable.
- Identify what the developers of a new senior living campus would do differently (and why) if they had it to do over again.

Learner Level: Intermediate

Presenters: Amy Duhr, Clinical Systems Director, Grace Lutheran Foundation, Eau Claire, WI; Terry McLaughlin, AIA, NCARB, LEED AP, Co-Founder & Chairman, Community Living Solutions, Appleton, WI; Mary Panzer, President, Panzer Public Affairs Consulting, LLC, Madison, WI

### **D20** *Imagine the Possibilities: Maximizing the Power of the MDS in Your Organization*

Never before has the MDS played such a critical role in almost every aspect of our skilled nursing facility (SNF) operations. From reimbursement to regulatory considerations, from Quality Measures to 5 Star ratings and Value Based Purchasing, the MDS is a pivotal piece of what drives many of our operational decisions. We rely on the data contained in the MDS to help predict our financial viability and our ability to interact favorably with the ACOs. We look to the trends noted in the MDS to plan our QAPI projects and guide our staffing decisions. This interactive session will explore how the MDS process impacts all areas of the SNF organization and how to harness that power for positive impact!

- Explore how the MDS data is financially predictive based on a variety of payor sources.
- Discuss the correlation between the MDS and the various quality reporting programs and how the data will affect admissions and census.
- Outline how each department impacts, and is impacted by, the MDS and list strategies for maximizing the power of the MDS for overall improvements.

Learner Level: Intermediate

Presenter: Amy Ruedinger, CEO & Founder, Pinnacle Innovative Healthcare Solutions, Black Creek, WI

### **D21** *Ingredients for Success: Culture Change in Dining*

Attendees will learn about the journey that Saint John's On The Lake, a continuum of care community in Milwaukee, has been on as they have implemented and reimagined Person First Care for the last 15 years. The session will focus on how culture change has impacted dining and how residents and staff have found a balance in meeting resident wishes and regulatory requirements.

- Outline the 15-year history and journey of one facility in the implementation of cultural change and its impacts on dining.
- Analyze why the dining experience is an important aspect of our resident's lives and why we must look beyond just the physical setting.
- Explore strategies for handling challenges and to problem solve solutions in relation to culture change in dining.

Learner Level: Intermediate

Presenters: John George, Nursing Home Administrator, Saint John's On The Lake, Milwaukee, WI; Anne Luther, LifeStreams and Volunteer Manager, Saint John's On The Lake, Milwaukee, WI



## Thursday, October 3 - 3:45 p.m. to 5:00 p.m. (continued)

### **D22** *Light Duty Requests*

In this session, participants will learn about employer responsibilities to accommodate employee requests for light duty and practical guidance in facilitating a request.

- Discuss when light duty work is a reasonable accommodation under the Americans with Disabilities Act.
- Explore light duty opportunities for pregnant employees.
- Analyze considerations regarding light duty and worker's compensation.

Learner Level: Intermediate

Presenter: Jessica M. Kramer, Managing Partner of Kramer Elkins & Watt, LLC, Madison, WI

### **D23** *Protecting Your Organization Against Litigation Possibilities*

Assisted living providers face many challenges and the prospect of litigation may be easy to ignore because it is perceived to be solely a problem for skilled nursing facilities. But litigation against assisted living is on the rise. Being aware of the hot issues arising in litigation against assisted living facilities can help providers craft effective policies and strategies to pro-actively deal with situations that may evolve into litigation. This session will focus on the current litigation environment faced by assisted living facilities, including the top issues currently being litigated by personal injury plaintiffs, the effective use of arbitration clauses, and potential enforcement litigation by government agencies.

- List the issues currently being most litigated by private plaintiffs and discuss strategies for handling issues that have the potential to result in litigation.
- Analyze the utility of arbitration clauses in admission agreements.
- Explore the landscape of government enforcement litigation, including quality of care cases and enforcement of the Americans with Disabilities Act.

Learner Level: Intermediate

Presenters: Stacy Gerber Ward, Member, Health Law Section, Chair, Government Enforcement and Corporate Investigations Section, von Briesen & Roper, s.c., Milwaukee, WI; Chris Kenyon, Senior Account Executive/Partner, Senior Living and Social Services Practice Group Leader, M3 Insurance, Madison, WI

### **D24** *No Excuses: Know Your Residents and How to Connect with Them* (Part 2)

(Discussion will continue from Session C18.) Continuing from the first session, participants will engage in interactive conversation and will complete evaluations on their current organization's marketing efforts to assess what is and is not working. Additionally, participants will address who they see as the consumer of the future and how to create a marketing plan targeting those residents.

- Complete an exercise defining the resident of the future.
- Perform a marketing and sales assessment on your organization's existing marketing efforts.
- Discuss how you can align the marketing and sales team with the organization's long-term success.

Learner Level: Intermediate

Presenter: Jamie Timoteo, Senior Vice President, Plante Moran Living Forward, Chicago, IL; Kyle Schnurbusch, Partner/Content, OrgStory, Chicago, IL

## Thursday, October 3 - Evening of Entertainment

**7:00 p.m. to 8:00 p.m.**

### **Atlas Improv**

Join us as Atlas Improve takes the stage. This is a reality show built on a foundation of improvised theater, an art form of spontaneous creation. The performers will build crazy on top of crazy and the unexpected on top of the already spontaneous. In this reality show, you (as a member of the audience) can actually make a difference and the only thing certain is it's unscripted.



**8:00 p.m. to 11:00 p.m.**

### **The Fabulous Rugburns**



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Thursday, October 3, 2019 -- 6:30 p.m. to 11:00 p.m.



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Thursday, October 3, 2019 -- 6:30 p.m. to 7:30 p.m.

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## Friday, October 4 - 8:15 a.m. to 9:45 a.m.

### **E25** *New Concept! New Development! New Lifestyle! Senior Housing Cooperatives!*

Attend this session to explore how senior housing cooperatives compare with other senior living options. You will learn about a mid-western idea with a proven 40-year history that is growing throughout the United States. Come learn about this appealing new housing concept. Discover why so many seniors are choosing the cooperative lifestyle.

- Define what a senior housing cooperative is and outline how such a cooperative is structured.
- Compare and contrast a senior housing cooperative with other senior living options, such as: Condominiums, town homes, and independent living senior rentals.
- List the many lifestyle benefits of living in a senior housing cooperative and discuss why there is growing interest in the development of senior housing cooperatives throughout the United States.

Learner Level: Intermediate

Presenters: Nadette Waligora, Director of Homeowner Associations, Ebenezer Management Services, Minneapolis, MN; Shona M. Schmall, Regional Manager of Homeowner Associations, Ebenezer Management Services, Minneapolis, MN; Todd Willett, Chief Financial Officer, Ebenezer Management Services, Minneapolis, MN

### **E26** *Creating Stronger Organizations through Aggressive Growth Strategies (Part 1)*

Not-for-profit providers must continue to grow, evolve, and reinvest in their communities to remain competitive. Learn how the not-for-profit senior living sector is behaving with regard to growth and mission expansion. Presenters will discuss the current state of the senior living capital markets and how organizations are funding growth initiatives. (Discussion will continue in Session F32.)

- Discuss the impact of the current state of the senior living environment on growth and strategic planning efforts.
- Explore ways senior living organizations are creating scale in markets and sharpening their competitive positions.
- Outline the process of evolving a growth strategy, gaining alignment among constituents, and executing on a variety of different initiatives to broaden market reach.

Learner Level: Advanced

Presenters: Daniel J. Hermann, President & CEO, Ziegler, Chicago, IL; Will Carney, Managing Director, Ziegler, Chicago, IL; Aaron Schroeder, Senior Vice President, Ziegler, Milwaukee, WI

### **E27** *Skeletons in the Closet: The Impact of Past Trauma on People Living with Dementia and Their Care Partners (Part 1)*

When family histories include past addiction, abuse, and trauma, care can be compromised for people living with dementia and their care partners. This workshop will explore how early trauma may impact individuals in later life through engaging stories, case studies, and discussion, including strategies for counseling and reducing caregiver stress. (Discussion will continue in Session F33.)

- Analyze the complex relational challenges facing care partners who provide care for someone with a history of addiction, mental illness, abusive behavior, or estrangements.
- Discuss the role that family history, relationship changes caused by dementia, or other complicating factors play in the overall coping abilities of people living with dementia in later life, as well as with their care partners.
- Identify strategies for counseling and supporting care partners around complex relational histories which impact current caregiving challenges and levels of distress.

Learner Level: Intermediate

Presenter: Kay Adams, LCSW, Founder of Compassion Works, LLC, Wheat Ridge, CO



## Friday, October 4 - 8:15 a.m. to 9:45 a.m. (continued)

### **E28** *Imagine a Workplace Free from Harassment, Discrimination, and Bullying*

In this session, we will look at recent legal and societal developments regarding harassment, discrimination, and bullying. We then will discuss the critical elements of internal investigations and how this all relates to fostering a positive corporate culture (including practical tools and tricks, old and new).

- Analyze your harassment and discrimination policies to ensure they are legally compliant and up to date.
- Define when an internal investigation is in order and discuss how to go about handling such situations.
- Outline the steps for assessment and decision-making to demonstrate your understanding all the possibilities flowing from an internal investigation.

Learner Level: Intermediate

Presenter: Mark Goldstein, Principal, Goldstein Law Group, s.c., Milwaukee, WI

### **E29** *A Night and Day Difference*

Learn how to create a restorative sleep program to make a night and day difference for the residents you serve. This program was developed by Empira after identifying sleep fragmentation as a primary contributor to some of the most challenging issues facing aging services, such as falls, behavioral expression, pain, incontinence, skin breakdown, unnecessary use of antipsychotics, and function decline. Participants will learn why restorative sleep is important and how to create a culture of restorative sleep.

- Apply the principles of Root Cause Analysis to restorative sleep (a basic biological need).
- Identify practices that disturb consolidated sleep in the nursing home or assisted living setting.
- List the steps necessary for creating a culture of restorative sleep to serve as a foundation to addressing challenges in caring for the older adult.

Learner Level: Basic to Intermediate

Presenter: Kelly Klund, Resource Nurse, Empira, Cambridge, MN

### **E30** *How to Learn What People Say about Your Culture*

In this session, you will learn how to take the “temperature” of your residents, prospects, and other stakeholders to determine how their impressions of your organization match your impression of your organizational culture. You will learn about traditional and cutting-edge tools and techniques that effectively explore those impressions and how to measure these impressions long-term.

- Outline how the characteristics of the next wave of prospects will impact your community and discuss how to prepare for them.
- List what types of research are available for community leaders and identify which are appropriate for various situations.
- Discuss how to detect differences in culture perceptions between different stakeholders and list strategies for addressing those differences.

Learner Level: Intermediate

Presenters: Karen Adams, Vice President, Market Intelligence, Love & Company, Frederick, MD; Tim Bracken, Vice President, Relationship Management, Love & Company, Frederick, MD

## Friday, October 4 - 10:00 a.m. to 11:30 a.m.

### **F31** *Imagine the Future of Wisconsin Skilled Nursing*

The increased closure rate in Wisconsin skilled nursing facilities drives the need for a change in how we identify and respond to opportunities across the continuum of senior care. Skilled nursing facility operators must maximize opportunities to get paid fairly for the care provided, to balance risks and rewards, and to stay financially strong. Through a combination of case study and discussion, this session will discuss the recent skilled nursing facility closures as a backdrop to understanding and evaluating opportunities, aligning organizational objectives, and discussing new ways to improve the rewards (revenue) for facing these risks.

- Analyze the impact of Wisconsin skilled nursing facility closings, current status, and legislative efforts.
- Explore strategies to maximize financial and clinical results while maintaining profitability.
- Outline how to maximize the greatest revenue opportunities through acquisitions, new payment models, collaborative relationships, and organizational excellence.

Learner Level: Advanced

Presenters: Tim Kamke, Shareholder, Reinhart Boerner van Deuren, s.c., Milwaukee, WI; Michael Peer, Principal, CliftonLarsonAllen, LLP, Milwaukee, WI

### **F32** *From Strategy to Reality: Exploring Successful Project Development & Design Solutions* (Part 2)

(Discussion will continue from Session E26.) The business of senior living continues steady activity in campus renovation, expansion, and new development projects. Project execution has been pressured recently due to construction workforce shortages, increasing material costs, and the negative impacts of government-imposed tariffs. This session will spotlight how several projects achieved success despite these challenges.

- Outline the development process and how to plan and implement a new campus or major expansion.
- Discuss what other not-for-profit providers are developing in their communities.
- Explore the intricacies of what a second campus may look like and the new amenities coming of age.

Learner Level: Advanced

Presenters: Jamie Timoteo, Senior Vice President, Plante Moran Living Forward, Chicago, IL; Eric Harrmann, Senior Associate, AG Architecture, Wauwatosa, WI

### **F33** *Skeletons in the Closet: The Impact of Past Trauma on People Living with Dementia and Their Care Partners* (Part 2)

(Discussion will continue from Session E27.)

- Analyze the complex relational challenges facing care partners who provide care for someone with a history of addiction, mental illness, abusive behavior, or estrangements.
- Discuss the role that family history, relationship changes caused by dementia, or other complicating factors play in the overall coping abilities of people living with dementia in later life, as well as with their care partners.
- Identify strategies for counseling and supporting care partners around complex relational histories which impact current caregiving challenges and levels of distress.

Learner Level: Intermediate

Presenter: Kay Adams, LCSW, Founder of Compassion Works, LLC, Wheat Ridge, CO

## Friday, October 4 - 10:00 a.m. to 11:30 a.m. (continued)

### F34

#### *"I Love My Job" -- The Workplace as a Safe Place and an Opportunity for Marketing and Branding*

In this session we will talk about the various ways in which we can "take the temperature" of our workforce, anticipate issues, encourage critical conversations, and course correct when things go sideways (including practical tools and tricks, old and new).

- Discuss what we can rightly expect from our employees and how to articulate that.
- Identify what our employees rightly expect from us and discuss how to satisfy those expectations.
- List tools for conflict resolution and outline when and how to step in and how far to go.

Learner Level: Advanced

Presenter: Mark Goldstein, Principal, Goldstein Law Group, s.c., Milwaukee, WI

### F35

#### *Two CNAs and a Gait Belt Walk Into a Room...Imagine the Possibilities*

Transferring and moving residents is a leading cause of injury to staff and residents and a significant factor in resident falls. Best practice safe resident handling and mobility programs are critical to maintaining a safe work environment. This session will provide: Components of the program, transfer assessments, tools to sustain a program, and hands-on transfer demonstrations.

- List key objectives for a "Best in Class" safe resident handling and mobility program.
- Identify appropriate transfer method for residents.
- Explore components to sustain a successful program.

Learner Level: Intermediate

Presenters: Twila Hurst, RTR (CT), Loss Control Consultant, United Heartland, Green Bay, WI; Collett K. Mitchell, RN, BSN, CSPHP, Senior Loss Control Specialist, United Heartland, Green Bay, WI

### F36

#### *Hands-on Workshop: Developing a Culture of Listening*

This session will help organizations develop a culture of listening through a workshop format. Participants will create questioning strategies that explore their current culture and prepare for future residents by asking questions that generate reliable, honest feedback. The workshop will close with strategies for marketing the community's culture more effectively and accurately.

- Develop a questioning strategy and develop specific questions designed to be non-threatening, non-leading, and open-ended.
- Discuss how to build multiple opportunities for listening to your stakeholders to ensure continual real-time feedback on an ongoing basis.
- Explore how to incorporate your key culture points into your organization's branding and marketing efforts.

Learner Level: Advanced

Presenters: Karen Adams, Vice President, Market Intelligence, Love & Company, Frederick, MD; Tim Bracken, Vice President, Relationship Management, Love & Company, Frederick, MD

## Conference App

About three weeks prior to the conference, registrants will be emailed information to download the free conference app. Attendees can integrate their social media accounts, sync their conference schedules, set reminders for sessions, rate sessions, share contacts, send messages, track exhibitors, navigate the event, and more. Exhibitors will be searchable by name, by category, and by booth location. Attendees easily 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.

Please note: LeadingAge Wisconsin will not be printing handouts for this conference. LeadingAge Wisconsin strongly encourages attendees to bring a computer, tablet, notebook, or smart phone – this will be your source for all information about the conference.

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## Online Registration

To register for the 2019 Fall Conference, please complete your online registration at <https://cvent.me/7rk9Q>. To qualify for the early registration discount, you must complete and submit your registration by September 11, 2019.

### Online Event Summary



This conference is packed with ideas to help you imagine a multitude of possibilities. The registration fee includes the educational sessions, admission to the 39th Annual Exhibitors Forum, the Welcoming Reception, the Evening of Entertainment, the conference app, break refreshments, and meals as listed.

### Online Registration



All registrations must be completed online at <https://cvent.me/7rk9Q>. If you need assistance, please contact LeadingAge Wisconsin at 608-255-7060. Credit card is our preferred method of payment. There is a separate fee for the pre-conference workshops. Refunds will be made only if requested by September 25, 2019.

**Online Event Summary:**  
<https://cvent.me/VZNxm>

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Friday, October 4, 2019 -- 9:45 a.m. to 10:00 a.m.

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