

MOMENTUM

2022 Spring Conference & Annual Business Meeting



LeadingAge™
Wisconsin

Kalahari Resort

May 4-6, 2022 - Wisconsin Dells



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Refresh. Recharge. Renew. Momentum

To continue the valuable work that you contribute to your organization every day, you have to take care of yourself too. LeadingAge Wisconsin understands the challenges you've faced over the last two years, and we want to help you refuel and refocus in the months ahead. Join us for the 2022 Spring Conference and Annual Business Meeting from May 4th to May 6th. By exploring critical topics like workforce, culture, trends and innovation, technology, and leadership, you'll connect with like-minded aging services professionals to replenish your mental and emotional coffers so you can return to work feeling ready for whatever comes next. Step outside your office and join us for a restorative experience, where you'll rediscover your passion for the aging services field, ignite your creativity, and enhance your ability to keep moving with forward *Momentum*.

Take time for you, while powering the future of your organization. Register today [<https://cvent.me/0881WB>] for the 2022 Spring Conference and Annual Business Meeting.

Momentum May 4-6, 2022

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 4 - Pre-conference	\$ 30 per person
May 5-6 - Conference	\$285 per person
May 5 only - Conference	\$200 per person
May 6 only - Conference	\$125 per person

Non-Members of LeadingAge Wisconsin	
May 4 - Pre-conference	\$ 60 per person
May 5-6 - Conference	\$335 per person
May 5 only - Conference	\$250 per person
May 6 only - Conference	\$175 per person

These fees reflect the early bird registration fee. If you complete your online registration after April 13, 2022, 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 4 - Pre-conference) are 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 Evening of Entertainment, access to the conference app, name badges, break refreshments, and meals listed in this program booklet.

Location & Accommodations

Kalahari Resort
1305 Kalahari Drive
Wisconsin Dells WI 53965
(Room rates begin at \$115)

Please reserve your rooms now using the linked passkey below. Overnight accommodations are available on a first-come-first-served basis.

Booking Website:
<https://book.passkey.com/e/50282081>

The LeadingAge Wisconsin discounted rates apply only if you make your room reservations by April 3, 2022. 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 Resort does not accept completed Letters of Authorization forms, Tax Exemption forms, nor Purchase Orders to be submitted at the hotel check-in. They have a dedicated team that approves these forms to ensure validity prior to attachment to the reservations prior to check-in. These forms should be submitted no later than 7 days in advanced to dellscallcenterfax@kalahariresorts.com or fax them to 608-254-6116. They highly suggest that you submit these forms a minimum of two weeks in advanced 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/>).

LeadingAge Wisconsin Cancellation Policy

Any conference cancellation prior to April 26, 2022 will receive a 100 percent refund of the registration fee. After April 26, 2022, 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. If you have a concern with any aspect of this educational offering, please contact the LeadingAge Wisconsin office at JMashak@LeadingAgeWI.org.

COVID

LeadingAge Wisconsin continues to monitor the COVID pandemic and the related CDC guidelines. As we get closer to the conference, we will issue detailed information to comply with current guidance and follow best thinking as to how to keep attendees safe and ensure they have an enjoyable conference. At this time, **Kalahari Resort does not require face masks.**

Online Registration



Click Here to Register:
<https://cvent.me/0881WB>

To qualify for the early registration discount, you must complete and submit your registration by April 13, 2022.



Click Here for a Conference Summary:
<https://cvent.me/Z11Q4a>

All registrations must be completed online. If you need assistance, please contact LeadingAge Wisconsin at JMashak@LeadingAgeWI.org.

For Additional Information Contact:

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

Schedule at a Glance

Wednesday, May 4, 2022

8:00 a.m. to 4:30 p.m.	Registration Open
9:00 a.m. to 10:25 a.m.	LeadingChoice Network Spring Meeting (<i>LeadingChoice Network members only</i>)
10:35 a.m. to 12:00 p.m.	Networking Meetings There will be networking meetings for: Echelon, Clinical Professionals, Finance Professionals, Human Resource Professionals, Social Service Professionals, and Marketing Professionals
12:00 p.m. to 1:15 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 6-10) PC1 - <i>Building Your Desired Culture</i> (Sponsored by Value First) PC2 - <i>Active Adult Living: Building Momentum for the Boomers and your Future</i> PC3 - <i>Creating Forward Momentum for your Infection Prevention and Control Program</i> PC4 - <i>Leading and Living Through Your Values</i> (Sponsored by MarshMcLennan Agency) PC5 - <i>Technology Forum</i>
5:00 p.m. to 8:00 p.m.	Welcoming Reception (Sponsored by M3 Insurance)

Thursday, May 5, 2022

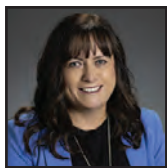
7:00 a.m. to 5:00 p.m.	Registration Open
7:00 a.m. to 8:00 a.m.	Continental Breakfast (Sponsored by Mutual of America Financial Group)
8:00 a.m. to 9:15 a.m.	Conference Opening & Keynote Address (Details on page 13) <i>Building Resilient Teams: Remodel, Renovate and Re-energize Post-Pandemic</i> (Sponsored by Ziegler)
9:15 a.m. to 10:00 a.m.	LeadingAge Wisconsin Annual Business Meeting (Details on page 13)
10:00 a.m. to 10:15 a.m.	Break (Sponsored by Wisconsin Health & Education Facilities Authority - WHEFA)
10:15 a.m. to 11:15 a.m.	Six Simultaneous Breakout Sessions (Details on pages 14-16) A01 - <i>Advancing Single-Site Organizations in a Time of Consolidation</i> A02 - <i>Improving Financial Performance with Procure-to-Pay Technology</i> A03 - <i>Living with COVID: Leverage the Momentum to Move Forward</i> A04 - <i>Culture Driven Recruitment and Retention</i> A05 - <i>COVID-19: It Came in Like a Wrecking Ball</i> A06 - <i>Positively Impacting Residents and Staff with Physical Plant Updates</i>
11:15 a.m. to 11:30 a.m.	Break
11:30 a.m. to 12:30 p.m.	Five Simultaneous Breakout Sessions (Details on pages 18-20) B07 - <i>Come Together: Thinking about Collaborations, Affiliations, and Mergers</i> B08 - <i>Staffing the Business Office</i> B09 - <i>Transitioning Forward with a Focus on Quality</i> B10 - <i>Build Your Team Momentum: The Tools and Tactics to Re-energize</i> B11 - <i>Gaining Momentum to Prevent Falls in Wisconsin</i> B12 - <i>Outsourcing: The Future of Long-Term Care</i>
12:30 p.m. to 1:15 p.m.	Lunch

1:15 p.m. to 2:45 p.m.	Six Simultaneous Breakout Sessions (Details on pages 21-23) C13 - Growth and Scale: Finding the Balance in Senior Living C14 - Key Performance Data Analytics with Benchmarks C15 - Driving Forward: Legal Update for Skilled Nursing Facilities C16 - One Shift at a Time: A Guide to Finding the Right Talent C17 - When Momentum Intersects with Complaints C18 - Solar for Seniors: Sustainable Energy Initiatives Benefitting Senior Care Continuum
2:45 p.m. to 3:00 p.m.	Break (Sponsored by Community Living Solutions)
3:00 p.m. to 4:30 p.m.	Six Simultaneous Breakout Sessions (Details on pages 24-26) D19 - Entering the World of Long-Term Care Expansion D20 - Tips to Soften the Impact of the 15 Percent Therapy Part B Assistant Cut D21 - Maintaining Momentum Following an IJ Citation D22 - Using Gamification to Inject Momentum into your Recruiting and Retention Efforts D23 - Driving Forward: Legal Update for Assisted Living D24 - A Look Ahead: Emerging Trends for the Future of Senior Living
5:00 p.m. to 6:00 p.m.	Hospitality Reception (Details on pages 27-28) (Sponsored by Hoffman Planning, Design & Construction and CliftonLarsonAllen)
6:00 p.m. to 7:30 p.m.	Dinner (Details on pages 27-28) (Sponsored by Compeer Financial)
7:30 p.m. to 10:30 p.m.	Evening of Entertainment (Details on pages 27-28) (Sponsored by CliftonLarsonAllen and Martin Bros.)

Friday, May 6, 2022

6:45 a.m. to 11:30 a.m.	Registration Open
7:00 a.m. to 8:15 a.m.	Breakfast Buffet
8:15 a.m. to 9:45 a.m.	Six Simultaneous Breakout Sessions (Details on pages 29-31) E25 - Gain Momentum by Consolidating Operations E26 - The Basics of Medicaid Applications and the Role of the ADRC E27 - Gaining Momentum: Rolling Forward with Staff Competencies (Part 1) E28 - Foreign-Born PERM Workforce: The Key To Future Momentum E29 - Respiratory Protection and Qualitative Fit Testing (Part 1) E30 - Doing More with Less: Shifting Momentum in your Dining Program
9:45 a.m. to 10:00 a.m.	Break
10:00 a.m. to 11:30 a.m.	Six Simultaneous Breakout Sessions (Details on pages 32-34) F31 - Stabilizing and Developing a Sustainable Workforce through Immigration F32 - Collecting Accounts Receivable: Tips and Tactics to Help Protect Your Facility's Bottom Line F33 - Gaining Momentum: Rolling Forward with Staff Competencies (Part 2) F34 - Workforce Has Changed: How Do We Change With It? F35 - Respiratory Protection and Qualitative Fit Testing (Part 2) F36 - Innovations in Activities: Flow Art Abstract Vases
11:30 a.m.	Adjournment

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



PC1

Building Your Desired Culture

Culture is a consequence of the experiences, beliefs, and behaviors that leaders foster, which ultimately leads to results. If you want to change the culture, change the employees' experiences. The ultimate result – improved resident/patient experiences. In this workshop, we will discuss how leaders impact the culture within teams and/or organizations. (Attendance is limited to the first 50 C-suite registrants.)

Learner Objectives:

- Define the “Results Path” and discuss how to lead others towards a desired culture.
- Discuss how to connect the dots between culture and organization initiatives.
- Identify opportunities to write yourself into the story and demonstrate your role as a leader in impacting your culture.

Learner Level: Advanced

NAB/NCERS: 3.0 CEUs

NASBA: 3.5 CPEs

Field of Study: Business Management & Organization

Program Prerequisites: None

Advance Preparation Needed: None

Presenter: Aimeé Louw, Director, Customer Solutions, LAK Group, Brookfield, WI

Diamond Sponsor

Pre-conference Workshop PC1 featuring Aimeé Louw

Building Your Desired Culture

Attendance is limited to the first 50 C-Suite Registrants

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Value First

204 S Hamilton Street

Madison, WI 53703

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Value First is a group purchasing organization (GPO) that provides free, no obligation services for LeadingAge senior living communities that can reduce their operational costs through discounted pricing and rebates on food, medical, janitorial, office supplies, and capital equipment. Value First is owned by LeadingAge and 25 state affiliates. Value First specializes in supporting the purchasing needs of LeadingAge members based on our extensive experience and knowledge of senior living.

Continuing Education

LeadingAge Wisconsin has requested this educational program, including the pre-conference workshops and the conference sessions, be approved for up to twelve (12) hours of continuing education for nursing home administrators and up to fourteen (14) NASBA/CPE credits.

NASBA Disclaimer: LeadingAge Wisconsin is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: www.nasbaregistry.org.

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
- Wisconsin Chapter of the National Association of Social Workers

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

(with a 15-minute break)



PC2

Active Adult Living: Building Momentum for the Boomers and your Future

The leading wave of boomers just turned 75. As they have done their entire life, they are going to define what they want rather than accept what past generations have accepted. Senior living is no exception. This workshop provides information, considerations, and strategies to assist leadership in evaluating if development of an active adult living community is right for your organization.

Learner Objectives:

- Analyze whether active adult living is a development strategy for your organization.
- Using case studies, explore marketing, design, and financing for this target market.
- Discuss how active adult living could grow your organization's mission and bottom line.

Learner Level: Intermediate

NAB/NCERS: 3.0 CEUs

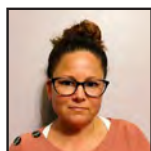
NASBA: 3.5 CPEs

Field of Study: Business Management and Organization

Program Prerequisites: None

Advance Preparation Needed: None

Presenters: Ken Arneson, President & CEO, Evergreen Retirement Community, Oshkosh, WI; Susan Farr, Vice President of New Business Development, Ebenezer Management Services, Edina, MN; Quintin Harris, Managing Director, Lument, New York, NY; Duane Helwig, NCARB, AIA, Architect, Partner, Vice President of Design, Community Living Solutions, Appleton, WI; John Huhn, LNHA, Vice President of Senior Living Operations and Business Development, Community Living Solutions, Appleton, WI; Michael A. Peer, CPA, CHC, Principal, CLA (CliftonLarsonAllen LLP), Milwaukee, WI



PC3

Creating Forward Momentum for your Infection Prevention and Control Program

This interactive workshop will take participants through a virtual environment of care tour where they will learn to identify and correct infection control risks. Participants will leave with the tools they need to build and maintain a multi-disciplinary infection prevention and control program to optimize the safety of residents and staff.

Learner Objectives:

- Identify various infection control risks that you may encounter in your organization.
- Demonstrate how to correct various infection control risks that you may encounter in your organization.
- Outline how to deploy a multi-disciplinary team approach to maintain EOC standards, surveillance, and audits in your organization.

Learner Level: Intermediate

NAB/NCERS: 3.0 CEUs

NASBA: 3.5 CPEs

Field of Study: Business Management and Organization

Program Prerequisites: None

Advance Preparation Needed: None

Presenters: Aimee Mikesch, BSN, RN, Southeast Region Infection Preventionist, Wisconsin Healthcare-Associated Infections Prevention Program, Wisconsin Department of Health Services, Green Bay, WI; Mariah Welke, MPH, CHES, Health Educator, Wisconsin Healthcare-Associated Infections Prevention Program, Wisconsin Department of Health Services, Brookfield, WI

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



PC4

Leading and Living Through Your Values

Who you are, what you hold dear, what upsets you, and what underlies your decisions as a leader all are connected to your personal values. The missed opportunity is, most people never take the time to learn what those precious and powerful intrinsic things are. In this session you will have the opportunity to do an introspective reflection on your very own personal values and recognize how they influence your personal and professional endeavors, including overcoming the current staffing crisis. You'll learn practical strategies you can implement immediately to apply these values in your daily routines, allowing you to use them as a driving force and a personal true north star.

Learner Objectives:

- Identify your top 10 personal values.
- Discuss why living a values-driven life is crucial for both personal and professional endeavors.
- List ways to live your values on a daily basis.

Learner Level: Intermediate

NAB/NCERS: 3.0 CEUs

NASBA: 3.5 CPEs

Field of Study: Personal Development

Program Prerequisites: None

Advance Preparation Needed: None

Presenter: Denise Boudreau, President, Drive, Manasquan, NJ

Diamond Sponsor

Pre-conference Workshop PC4

Featuring Denise Boudreau

Leading and Living Through Your Values

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MarshMcLennan Agency
2725 S Moorland Road
New Berlin, WI 53151
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MarshMcLennan 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 sector, for over 30 years. Please contact us at 262-305-7928.

Important Notes 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 (\$30 for members/subscribers; \$60 for non-members if you register by April 13, 2022) for any of the pre-conference workshops.

There is a separate (per person) registration fee for the 2022 Spring Conference.

What to Wear

LeadingAge Wisconsin encourages you to dress casually for all convention activities.

Kalahari Resort 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.

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

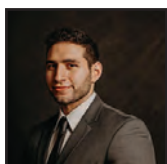
(with a 15-minute break)



PC5

Technology Forum

Come explore the realities, possibilities, practicalities, and efficiencies of technology that is now or soon will be available to employ in senior living and support organizations. In this hands-on science fair type forum, you will experience hands-on demonstrations as you learn about technology and its applications for reducing the workload of your team members and/or increasing resident engagement.



The following technologies and companies will be featured at this forum:

- Cinematic Health Education / ReadyCNA -- ReadyCNA is a comprehensive cloud-based training program to prepare individuals for careers as certified nursing assistants. The program revolves around "The Residents," a three-hour, Hollywood-quality movie that depicts the life of a newly hired CNA. ReadyCNA's innovative and interactive curriculum is designed to help ease the training burden on skilled nursing facilities.
- Direct Supply / Foodservice Robotics from LG / Machine Vision Falls Monitoring from Safely You / Medical Waste Disposal from Onsite Waste Management / Connected Vital Signs Collection with DS Smart / Nurse Call w/ Real Time Location Services from Centrak -- Direct Supply brings together products, platforms, and services to help improve healthcare operations and outcomes across the senior care environment. Explore how Direct Supply is both developing in house as well as partnering with startups and established brands to bring solutions to market that can reduce operational cost, improve resident outcomes, and increase operator revenues.
- It's Never 2 Late (iN2L) / Tablets and Group Engagement Systems -- The intuitively designed iN2L group engagement touch screen systems feature more than 5,000 content applications and, along with iN2L tablets, are the ideal tools to help any staff member easily create person-centered, meaningful, and fulfilling engagement experiences for residents. In addition to helping residents stay engaged, iN2L devices help them stay connected to family and friends, each other, and the world around them.
- Martin Bros / Mpower Point of Service / SafeCheck 360 -- Take resident meal orders and customize individual preferences from a mobile device or tablet. With a click of a button, print meal tickets or view orders on screen. Discover how you can achieve automation and efficiency for your frontline team to perform audits, screenings, trainings, and corrective action plans using mobile devices. Streamline reporting and managing data from your desktop computer
- Procurement Partners / Procure to Pay (P2P) -- Save money, time, and paper by digitizing 100 percent of your orders and invoices.
- Rendeever / Resident Engagement Platform and RendeeverFit™ -- Rendeever is overcoming social isolation through the power of virtual reality and shared experiences. Residents can check off bucket list items, revisit their childhood homes, and stay engaged with family members. RendeeverFit™ combines physical activity with social engagement and involves cognitive stimulation for the ultimate exercise experience.
- WeCare Connect / Employee Retention and Engagement -- WeCare Connect provides non-anonymous employee surveys to senior living organizations. Key features include immediate email notifications and real-time data displayed in powerful Insights dashboards. This data is leveraged to solve individual employee issues, drive down turnover, develop new hires, and improve recruiting efforts -- saving organizations substantial time and money.

Learner Objectives:

- Explore how to more effectively prepare CNAs for the role ahead.
- Explore current and emerging technologies to move senior living forward and identify those that might be appropriate for your organization.
- Explore how technology can reduce caregiver fatigue.
- Identify technology that would be applicable to your resident population for meaningful engagement.
- Explore how to transition from paper to electronic managing of audits, screenings, log recording, and staff competency in your senior living community.

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

Technology Forum (continued)

- Explore ways to streamline dining meal choices using a mobile tablet or device.
- Explore how you can significantly reduce vendor spend and staffing time and expense with a complete Procure to Pay platform yielding 10-20 times your return on investment.
- Explore how technology can help keep your residents and tenants actively engaged.
- Explore how powerful real-time employee surveys can help your organization dramatically drive down turnover and increase employee satisfaction.

Learner Level: Basic

NAB/NCERS: 3.0 CEUs

NASBA: 3.5 CPEs

Field of Study: Computer Software & Applications

Program Prerequisites: None

Advance Preparation Needed: None

Presenters:

- Bobby Allen, Sales Manager, Rendever
- Abby Cox, Client Success Manager, Cinematic Health Education, Inc.
- Christy Edwards, Marketing Dietitian, Martin Bros Distributing
- Jon Golm, President and CEO, WeCare Connect
- Laura Mock, CTRS, CDP, Implementation and Training Manager, It's Never 2 Late (iN2L)
- Khaled Salem, Sales Executive, Procurement Partners
- Chad Schaedler, Chief Revenue Officer, Cinematic Health Education, Inc.
- Justin Smith, Innovation and Technology Manager, Direct Supply Inc
- Rusty Zosel, Founder and Senior Vice President of Channel Management, Procurement Partners

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Deluxe Conference Name Badge Booklets with Conference Schedule

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CPAs and Consultants

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Eau Claire, WI 54702-0690
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Wipfli's health care practice serves a wide array of health care organizations nationwide, including home health, hospice, palliative care, assisted living, and senior living providers. Our team includes clinical and administrative professionals who have spent their entire careers in health care. We understand the financial reimbursement environment and the complexities facing health care today. We focus our attention on the following service offerings and can custom-build a solution for your needs: Case management assistance and case mix optimization, clinical and therapy consulting, education and training, financial assessments, medical review or ADR assistance, Medicare assessments, mock surveys, operational assessments, and QAPI process.

Diamond Sponsor**Welcoming Reception Beverages**

Wednesday, May 4, 2022 -- 5:00 p.m. to 8:00 p.m.

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**Senior Living &
Social Services**

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

Conference Sponsor
Continental Breakfast

Thursday, May 5, 2022 -- 7:00 a.m. to 8:00 a.m.

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Diamond Sponsor
Refreshment Break

Thursday, May 5, 2022 -- 10:00 a.m. to 10:15 a.m.

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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.



Choices ■ Solutions ■ Savings

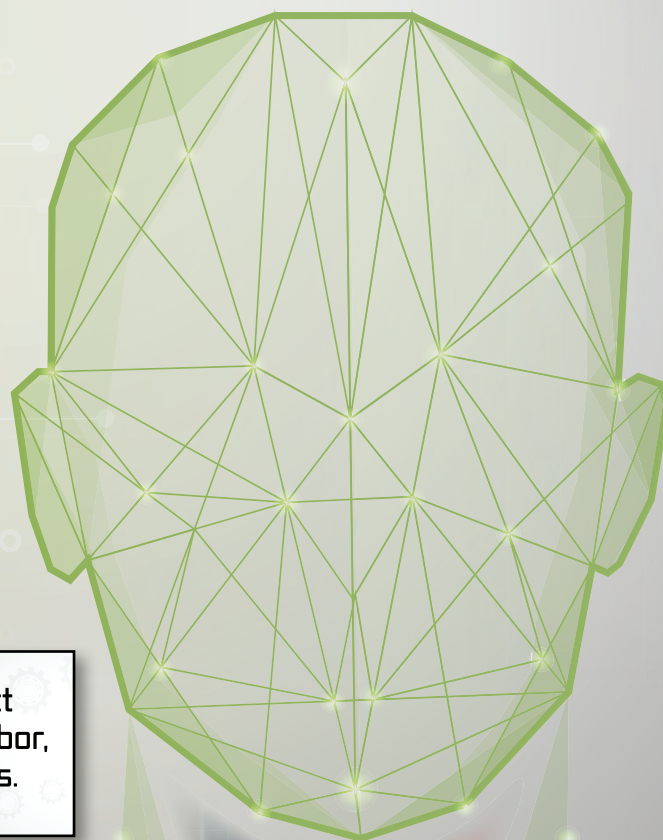
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products,
technologies
and efficiencies
for senior living
communities



Click to learn about product solutions for savings on labor, time and cost of operations.



Contact your Value First representative for assistance
Denise May • dmay@leadingagewi.org • 608.609.6964

Thursday, May 5 - 8:00 a.m. to 9:15 a.m.



Keynote

Building Resilient Teams: Remodel, Renovate and Re-energize Post-Pandemic

Your team's foundation is shaken. The COVID-19 pandemic brought new levels of stress, fear, and workload to your team. So how do you care for one another and build resilient teams as you move through this new environment? In this keynote, Kathy Parry walks you through the big issues facing you and your team post-pandemic. Using interactive exercises, storytelling, and a bit of humor, Kathy will give you critical insights on how to begin renovating your teams. Participants will look at workforce issues necessary to build stronger teams so retention and productivity stay high.

Learner Objectives:

- Identify how the pandemic has affected you and your team by examining both mental and physical burnout.
- Identify the five critical tools needed to care for each other and build resilient teams.
- Outline the elements of a project timeline for building a caring team model to implement within six weeks.

Learner Level: Basic

NAB/NCERS: 1.0 CEU

NASBA: 1.0 CPE

Field of Study: Business Management and Organization

Program Prerequisites: None

Advance Preparation Needed: None

Presenter: Kathy Parry, Founder and Owner, Corporate Energy Expert, LLC, Pittsburgh, PA

Diamond Sponsor

Keynote Address Featuring Kathy Parry

Thursday, May 5, 2022 -- 8:00 a.m. to 9:15 a.m.

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735 N Water Street, Suite 1000

Milwaukee, WI 53202

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Ziegler is one of the nation's leading underwriters of financing for not-for-profit senior living providers. Ziegler offers creative, tailored solutions to its senior living clientele, including investment banking, financial risk management, merger and acquisition services, seed capital, FHA/HUD, capital, and strategic planning as well as senior living research, education, and communication.

LeadingAge Wisconsin 2022 Annual Business Meeting

May 5, 2022

9:15 a.m. to 10:00 a.m.

Celebrate the successes of LeadingAge Wisconsin over the past year. Learn where our momentum will take us in the year ahead. Meet the winners of the Safe Resident Assistance Program Grant. Elect individuals to serve on the LeadingAge Wisconsin Board of Directors.

This is your association; join us for our 2022 Annual Business Meeting and help shape our success as we move forward together.

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.

Thursday, May 5 - 10:15 a.m. to 11:15 a.m.



A01

Advancing Single-Site Organizations in a Time of Consolidation

Now more than ever, organizations need to be strategic in their approach to navigating change, surviving crisis, and finding opportunities to thrive. Many non-profit, single-site senior living providers remain committed to autonomy as they pursue growth and mission advancement in an environment that is seeing an increasing amount of consolidation. This session will explore some of the approaches that organizations can (and must) take to grow, strengthen, and remain competitive.

Learner Objectives:

- Analyze the different ways that single-site organizations are partnering with each other in structures that don't include a formal affiliation.
- List tools you can use to recognize when it might be time to move beyond being a standalone organization before it's too late.
- Explore, through case studies, strategies and solutions standalone organizations can deploy to position themselves for success.

Learner Level: Advanced

NAB/NCERS: 1.0 CEU

NASBA: 1.0 CPE

Field of Study: Business Management & Organization

Program Prerequisites: None

Advance Preparation Needed: None

Presenters: Dan Hermann, President & CEO, Head of Investment Banking, Ziegler, Chicago, IL; Aaron Schroeder, Director, Senior Living Investment Banking, Ziegler, Milwaukee, WI



A02

Improving Financial Performance with Procure-to-Pay Technology

This session will share how operators can save significant spend with vendors as well as reduce staff efforts around processing vendor transactions and approvals. Digitizing 100 percent of orders and invoices and providing vendor and contract compliance through easy to use technology will be reviewed (and no more paper invoices!).

Learner Objectives:

- Analyze the convenience and cost savings you could realize by transitioning to procure-to-pay technology.
- Discuss how your insight into invoices, alerts, spend, and budgets would be enhanced with procure-to-pay technology.
- Explore how procure-to-pay technology ensures compliance with your approved vendors and contracts with audits around pricing and business rules.

Learner Level: Intermediate

NAB/NCERS: 1.0 CEU

NASBA: 1.0 CPE

Field of Study: Computer Software & Applications

Program Prerequisites: None

Advance Preparation Needed: None

Presenter: Rusty Zosel, Founder and Senior Vice President of Channel Management, Procurement Partners, Brookfield, WI

Thursday, May 5 - 10:15 a.m. to 11:15 a.m. (continued)



A03

Living with COVID: Leverage the Momentum to Move Forward

Living with COVID appears to be our new normal in healthcare. Now is the time to leverage what we learned as well as the opportunities that lay ahead of us to gain the momentum for our organization's future. This engaging presentation will provide leaders with strategies and reasonable tools to move your team and organization beyond COVID-19.

Learner Objectives:

- Analyze the current trends and realities impacting the post-acute care sector that serve as a foundation for strategic growth.
- Identify opportunities to create a reasonable formula for building back stronger.
- Define three key leadership strategies and tools to assist in operationalizing opportunities into new realities for success.

Learner Level: Advanced

NAB/NCERS: 1.0 CEU

NASBA: 1.0 CPE

Field of Study: Business Management & Organization

Program Prerequisites: None

Advance Preparation Needed: None

Presenter: Lisa Thomson, BA, LNHA, HSE, CIMT, Chief Strategy and Marketing Officer, Certified INTERACT QIP Master Trainer, Pathway Health Services, Lake Elmo, MN



A04

Culture Driven Recruitment and Retention

Trying to hire the "right people" but can't figure out where to find them? Wish your turnover was lower? This session will focus on driving retention and improving recruitment efforts by utilizing your unique organizational culture. You want to attract the best so they stay with you and perform at their highest level. At the same time, you want to create a culture where fewer people leave so you don't have so many open positions to fill!

Learner Objectives:

- Outline a plan to improve retention rates and recruitment efforts by tapping into the fact that senior living can be an incredibly attractive place to work.
- Identify the unique benefits of working in our field and in your individual organization.
- Implement culture-driven changes after assessing recruitment, hiring, orientation, and onboarding efforts.

Learner Level: Intermediate

NAB/NCERS: 1.0 CEU

NASBA: 1.0 CPE

Field of Study: Personnel/Human Resources

Program Prerequisites: None

Advance Preparation Needed: None

Presenter: Denise Boudreau, President, Drive, Manasquan, NJ

Thursday, May 5 - 10:15 a.m. to 11:15 a.m. (continued)



A05

COVID-19: It Came in Like a Wrecking Ball

This session will focus on the struggles, successes, and lessons we learned during our roller coaster ride through the pandemic -- a ride that changed us all forever. Assisted living tenants will relate what it was like to live "Life with COVID" and wisdom they share as we begin looking to the future.

Learner Objectives:

- Analyze how the pandemic has changed us – good and bad.
- Referencing the wisdom shared by assisted living tenants, outline plans for forging ahead gracefully.
- Discuss ways to help your team members and tenants to come out on the other side of the pandemic, renewed and ready to thrive.

Learner Level: Basic

NAB/NCERS: 1.0 CEU

NASBA: 1.0 CPE

Field of Study: Personal Development

Program Prerequisites: None

Advance Preparation Needed: None

Presenter: Sandy Strittmater, Director, Bethany St. Joseph Corporation, La Crosse, WI



A06

Positively Impacting Residents and Staff with Physical Plant Updates

Decisions about indoor air quality and mechanical systems can support a cleaner, healthier living environment; a more sustainable building; and improved efficiencies to reduce operating costs. Learn how these investments elevate the standard of living for current residents, provide an enhanced workplace for staff, and help attract new residents (and staff).

Learner Objectives:

- Analyze the options for improving indoor air quality.
- List the benefits of mechanical systems that reduce fossil fuel use.
- Discuss how engineering has evolved to support the unique needs of senior housing at all levels of care.

Learner Level: Intermediate

NAB/NCERS: 1.0 CEU

NASBA: 1.0 CPE

Field of Study: Business Management & Organization

Program Prerequisites: None

Advance Preparation Needed: None

Presenter: Tony Luciano, P.E., Principal, Director of Engineering Services, AG Architecture, Wauwatosa, WI

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Online Registration

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All registrations must be completed online. If you need assistance, please contact LeadingAge Wisconsin at JMashak@LeadingAgeWI.org. There is a separate fee for the pre-conference workshops. Refunds will be **made only if requested by April 26, 2022.**

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The Attendee Lounge

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Thursday, May 5 - 11:30 a.m. to 12:30 p.m.



B07

Come Together: Thinking about Collaborations, Affiliations, and Mergers

One thing has become abundantly clear during COVID – going it alone is getting a lot harder. It's a good time to talk more about how aging services organizations might partner more effectively and align for risk, efficiency, and – quite frankly – survival. This session will discuss where to start, the differences among partnering arrangements, and how providers can think about their own organization.

Learner Objectives:

- Summarize the differing types of partnership arrangements for aging services providers.
- Differentiate the pros and cons of these arrangements and criteria often used in evaluating partnership opportunities.
- Develop an approach to partnering and potential options given organizational priorities and strategy.

Learner Level: Advanced

NAB/NCERS: 1.0 CEU

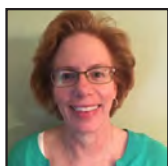
NASBA: 1.0 CPE

Field of Study: Business Management & Organization

Program Prerequisites: None

Advance Preparation Needed: None

Presenter: Andy Edeburn, Managing Partner, Elder Dynamics, Minneapolis, MN



B08

Staffing the Business Office

This session will focus on staffing options for the skilled nursing facility billing and business office. The functions of this office are changing and require staff that can learn and problem solve.

Learner Objectives:

- Identify training options for current staff.
- Discuss daily work patterns that cause back logs in billing.
- Analyze the job duties listing to audit your current business office.

Learner Level: Intermediate

NAB/NCERS: 1.0 CEU

NASBA: 1.0 CPE

Field of Study: Management Services

Program Prerequisites: None

Advance Preparation Needed: None

Presenter: Mary Petersen, Vice President of Financial Services, Specialized Medical Services, Inc., New Berlin, WI

Thursday, May 5 - 11:30 a.m. to 12:30 p.m. (continued)



B09

Transitioning Forward with a Focus on Quality

As we begin to transition beyond COVID-19, we will discuss what the survey process currently looks like. What are the trends that the state agency and Centers for Medicare and Medicaid are encountering? What impact is the workforce crisis having on quality and how can we work together better to support staff and work to ensure quality for the residents? We will discuss the top actions skilled nursing facilities need to take now to proactively address the most common citations.

Learner Objectives:

- Discuss the transition out of COVID-19 from the regulatory perspective.
- List the current trends/concerns from the state agency and CMS.
- Outline how to proactively address the most common citations.

Learner Level: Basic

NAB/NCERS: 1.0 CEU

NASBA: 1.0 CPE

Field of Study: Personal Development

Program Prerequisites: None

Advance Preparation Needed: None

Presenters: Ann Angell, Bureau Director, Bureau Of Nursing Home Resident Care, Division Of Quality Assurance, Madison, WI; Jessica Radtke, Deputy Bureau Director, Bureau of Nursing Home Resident Care, Division of Quality Assurance, Madison, WI



B10

Build Your Team Momentum: The Tools and Tactics to Re-energize

Participants will walk through several hands-on exercises to identify how to re-energize their teams. The exercises in this session are meant to spark awareness for how teams are drained of energy and methods to implement a Power UP program. Assessments and exercises for supervisors and directors to use with their teams include: clearly communicated team goals, individual contribution statements, team civility assessment and acknowledgment, and celebration checklist.

Learner Objectives:

- Discuss how to create a contribution statement for team members so acknowledgment and morale stay high.
- Demonstrate an understanding of team civility and learn the five ways incivility can be addressed.
- Create a team goal statement and a plan to integrate the goals on a daily, weekly, and monthly basis.

Learner Level: Intermediate

NAB/NCERS: 1.0 CEU

NASBA: 1.0 CPE

Field of Study: Business Management & Organization

Program Prerequisites: None

Advance Preparation Needed: None

Presenter: Kathy Parry, Founder and Owner, Corporate Energy Expert, LLC, Pittsburgh, PA

Thursday, May 5 - 11:30 a.m. to 12:30 p.m. (continued)



B11

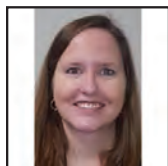
Gaining Momentum to Prevent Falls in Wisconsin

Wisconsin ranks number one in the nation for deadly falls among aging adults. In 2019, 40,000 elderly Wisconsin residents required emergency treatment for a fall injury. Falls accounted for 1,670 deaths. Join iCare and the Wisconsin Institute for Healthy Aging (WIHA) for an interactive discussion about strategies to prevent falls.



Learner Objectives:

- Identify statewide challenges to preventing deadly falls.
- List strategies to reducing falls.
- Discuss the effectiveness of evidence-based programs that prevent falls, such as Stepping On.



Learner Level: Intermediate

NAB/NCERS: 1.0 CEU

NASBA: 1.0 CPE

Field of Study: Personal Development

Program Prerequisites: None

Advance Preparation Needed: None

Presenters: Dave Nelson, Executive Director, Wisconsin Institute for Healthy Aging, Madison, WI; Shannon Myers, Director of Program Implementation, Wisconsin Institute for Healthy Aging, Madison, WI; Maggie Porter RN, Clinical Program Manager, Independent Care Health Plan (iCare), Milwaukee, WI



B12

Outsourcing: The Future of Long-Term Care

In this session you will learn why and how many facilities have begun the outsourcing of their business department. The presenters will discuss how the company outsourced to has helped Augusta Health and Rehabilitation (and many other facilities) remain successful during this difficult time.



Learner Objectives:

- Identify resources available to help your facility if you are considering outsourcing.
- Identify efficiencies in the business office process.
- Evaluate if outsourcing is right for your facility.

Learner Level: Intermediate

NAB/NCERS: 1.0 CEU

NASBA: 1.0 CPE

Field of Study: Management Services

Program Prerequisites: None

Advance Preparation Needed: None

Presenters: Jahn Bradley, Executive Director, Augusta Health and Rehabilitation, Augusta, WI; Chad Hable, Manager, Healthcare Practice, Wipfli LLP, Eau Claire, WI

Thursday, May 5 - 1:15 p.m. to 2:45 p.m.



C13

Growth and Scale: Finding the Balance in Senior Living

This session will offer participants information and tools to identify new locations when planning for future development. Discussion will address how you can scale value streams for success now and in the future and how Presbyterian Homes & Services is forward thinking on value added services, programs, and options for seniors.

Learner Objectives:

- List tools and processes used for market analysis.
- Identify growth objectives that allow you to stay true to your mission.
- Explore service options and enhancements beyond bricks and mortar.

Learner Level: Intermediate

NAB/NCERS: 1.5 CEU

NASBA: 1.5 CPE

Field of Study: Business Management & Organization

Program Prerequisites: None

Advance Preparation Needed: None

Presenter: Kari L. Ajack, Regional Director of Operations-Eastern Wisconsin, Presbyterian Homes and Services, Waukesha, WI



C14

Key Performance Data Analytics with Benchmarks

The need for data-driven insights has never been more important – how would you know that you were experiencing incredible results or that the organization was in trouble? Lacking data, leaders rely on experience to make decisions; however, the experience does not incorporate the rapid pace of change to senior living providers. Dashboards and benchmarks are available to every organization and can be valuable in closing the data gap. Through a combination of visuals, case study, and discussion, this session will discuss the use of different tools to evaluate results, align organizational outcomes, and discuss new ways to improve operating results.

Learner Objectives:

- Analyze methods for identifying and visualizing when the organization is operating outside of anticipated industry norms.
- Explore sources of industry data to use for benchmarking and for setting appropriate performance for the organization.
- Discuss how to take data insight and drive operational action.

Learner Level: Intermediate

NAB/NCERS: 1.5 CEU

NASBA: 1.5 CPE

Field of Study: Specialized Knowledge

Program Prerequisites: None

Advance Preparation Needed: None

Presenter: Michael A. Peer, CPA, CHC, Principal, CLA (CliftonLarsonAllen LLP), Milwaukee, WI

Thursday, May 5 - 1:15 p.m. to 2:45 p.m. (continued)



C15

Driving Forward: Legal Update for Skilled Nursing Facilities

In this session, attendees will get the opportunity for a “free-for-all” discussion of pressing legal topics for skilled nursing facilities. Attendees are encouraged to bring their questions and participate in a lively interactive discussion.

Learner Objectives:

- List the hot legal trends for skilled nursing facilities.
- Discuss what facilities should be focusing on for compliance.
- Identify the recent trends coming out of the Division of Quality Assurance.

Learner Level: Intermediate

NAB/NCERS: 1.5 CEU

NASBA: 1.5 CPE

Field of Study: Business Management & Organization

Program Prerequisites: None

Advance Preparation Needed: None

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



C16

One Shift at a Time: A Guide to Finding the Right Talent

Long-term care providers have been in a workforce crisis for many years, and that has only been highlighted by this pandemic. It's time to come out of crisis mode! Join us as we share ideas and strategies for finding the greatest talent around – one shift at a time.

Learner Objectives:

- Discuss ways to assess your workforce needs and to align workforce talent acquisition strategies with your organizational objectives.
- Identify three talent acquisition practices or strategies that you can take back to your organization.
- Explore ways to connect with your community with a specific focus on talent acquisition.

Learner Level: Intermediate

NAB/NCERS: 1.5 CEU

NASBA: 1.5 CPE

Field of Study: Personnel/Human Resources

Program Prerequisites: None

Advance Preparation Needed: None

Presenters: Wanda Plachecki, MA, NHA, Executive Director, La Crosse County Long-Term Care & Residential Services, La Crosse, WI; Kelly Kramer, NHA, Administrator, La Crosse County – Hillview Campus, La Crosse, WI



Thursday, May 5 - 1:15 p.m. to 2:45 p.m. (continued)



C17

When Momentum Intersects with Complaints

How does the culture of your community reflect the sense of “home” that your residents experience? This presentation focuses on the concerns brought to the Ombudsman Program that can be challenging to resolve in a resident-focused way, with an emphasis on resolutions that keep your momentum moving along a path that portrays not just great service but best service.

Learner Objectives:

- Examine the role of the ombudsman in resolving concerns and complaints, providing education, and working toward a positive and collaborative resolution in situations of conflict.
- Explore person-focused solutions to challenges such as family conflict and decision-maker boundaries issues that challenge residents' rights.
- Discuss communication strategies to enable resident-focused outcomes and satisfaction when working with issues of conflict and unique expectations.

Learner Level: Intermediate

NAB/NCERS: 1.5 CEU

NASBA: 1.5 CPE

Field of Study: Personal Development

Program Prerequisites: None

Advance Preparation Needed: None

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



C18

Solar for Seniors: Sustainable Energy Initiatives Benefitting Senior Care Continuums

This session will explore the newest green initiative at Sheboygan Senior Communities – a 448 bifacial panel solar array replacing at least 28 percent of current consumption, saving the organization at least 35 percent or \$40,000 per year. Discussion will detail the tax sponsor model, which makes these programs feasible for small nonprofits similar to Sheboygan Senior Communities.

Learner Objectives:

- Discuss solar technology with emphasis given to researching the financial gain and feasibility and articulating the concept to stakeholders – including getting your Board on board.
- Analyze solar technology including battery storage, installation, and cost savings.
- Explore how to leverage the “tax sponsor model” and grant availability to fund your project.

Learner Level: Intermediate

NAB/NCERS: 1.5 CEU

NASBA: 1.5 CPE

Field of Study: Specialized Knowledge

Program Prerequisites: None

Advance Preparation Needed: None

Presenters: Keith Conway, Energy Consultant, Arch Solar, Plymouth, WI; Dana Elmzen, Director of Marketing & Development, Sheboygan Senior Community, Sheboygan, WI; Stephanie Goetz, Director of Operations, Sheboygan Senior Community, Sheboygan, WI; Kurt Reinhold, Managing Director, Chief Executive & President, Legacy Solar Co-op, Madison, WI; Paul Treffert, CEO, Sheboygan Senior Community, Sheboygan, WI



Thursday, May 5 - 3:00 p.m. to 4:30 p.m.



D19

Entering the World of Long-Term Care Expansion

Expansion and growing your organization involves risk, and it's not for the faint at heart. This session will focus on project development from vision to construction and operations. Planning for each of these steps will greatly improve your opportunity for success. Providing management services is another expansion opportunity. We will discuss contracting structure, scope and integration of services, and financial impact.

Learner Objectives:

- Discuss the purpose of preparing a vision as your organization prepares for expansion.
- Outline the strategic planning process for expansion.
- Explore construction management and an operations strategy as you look to grow your organization.
- Analyze whether management services might be a good option for growing your organization.

Learner Level: Advanced

NAB/NCERS: 1.5 CEU

NASBA: 1.5 CPE

Field of Study: Management Services

Program Prerequisites: None

Advance Preparation Needed: None

Presenters: Amy Duhr, RN, BSEE, MBA, Chief Executive Officer, Grace Lutheran Communities, Eau Claire, WI; Todd D. Wilson, MS, CEO, Bethany Lutheran Homes/Eagle Crest Communities, La Crosse, WI



D20

Tips to Soften the Impact of the 15 Percent Therapy Part B Assistant Cut

When CMS finalized a 15 percent reduction in reimbursement for services provided by therapy assistants, most skilled facility operators assumed this cut primarily would impact their therapy providers and have little impact on their own bottom lines. We now know the assistant cut that began on January 1 is not automatically deducted from the therapy invoice. That means SNFs may receive less reimbursement while being billed the same amount by the therapy provider unless the SNF and therapy provider agreed to adjust contract rates for services provided by therapy assistants. Have you seen a reduction in your contracted expenses? Join us in this session to learn how therapy contracts are changing in this new environment.

Learner Objectives:

- Analyze the conflicting reports about the actual impact of the 15 percent reduction in therapy assistant reimbursement.
- Discuss why SNF operators must check therapy invoices carefully by both code and therapist to ensure they bill correctly for Part B therapy services.
- Identify areas where SNF operators and their therapy partners can work together to find ways to retain valuable therapy assistants and continue to achieve strong therapy outcomes while navigating the budget cuts.
- Explore other key therapy contract areas.

Learner Level: Advanced

NAB/NCERS: 1.5 CEU

NASBA: 1.5 CPE

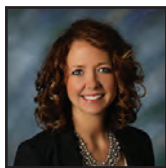
Field of Study: Specialized Knowledge

Program Prerequisites: None

Advance Preparation Needed: None

Presenter: Larry Lester, Principal, Wipfli LLP, Eau Claire, WI

Thursday, May 5 - 3:00 p.m. to 4:30 p.m. (continued)



D21

Maintaining Momentum Following an IJ Citation

In this session, presenters will share their recent experience with receiving an IJ citation and how they responded through staff education, support, and quality improvement initiatives. They also will detail communication and interaction they had with state officials, which helped them achieve the momentum to keep moving forward.

Learner Objectives:

- Outline the various implications to the facility and its staff of receiving an IJ citation.
- Explore best practices for abating an IJ, writing and executing a plan of correction, and communicating with stakeholders about the circumstances and consequences surrounding the IJ.
- Discuss how to support your facility's team through recovering from an IJ citation and moving forward with confidence in your clinical competence and quality improvement capabilities.

Learner Level: Intermediate

NAB/NCERS: 1.5 CEU

NASBA: 1.5 CPE

Field of Study: Business Management & Organization

Program Prerequisites: Knowledge of the skilled nursing facility survey scope and severity grid

Advance Preparation Needed: None

Presenters: Sondra Norder, NHA, HSE, FACHE, JD, President & CEO, St. Paul Elder Services, Inc., Kaukauna/Green Bay, WI; Megan Mashl, NHA, Administrator, St. Paul Home, Kaukauna, WI; Laura Weber, RN, Director of Nursing, St. Paul Home, Kaukauna, WI



D22

Using Gamification to Inject Momentum into your Recruiting and Retention Efforts

In today's workforce climate, leaders have faced increased challenges affecting their ability to keep employees engaged and excited about their job. One strategy that has been adopted in many organizations across several industries is gamification. This strategy can be used to measure metrics while building camaraderie within your team, increasing job satisfaction, and achieving goals.

Learner Objectives:

- Discuss why gamification can deliver results to your team.
- Outline the dos and don'ts of implementing gamification into the workplace.
- Demonstrate actual games you can incorporate into your work environment immediately.

Learner Level: Basic

NAB/NCERS: 1.5 CEU

NASBA: 1.5 CPE

Field of Study: Personnel/Human Resources

Program Prerequisites: None

Advance Preparation Needed: None

Presenter: Erika Kramer, LNHA, Senior Living Engagement Advisor, Martin Bros., Cedar Falls, IA

Thursday, May 5 - 3:00 p.m. to 4:30 p.m. (continued)



D23

Driving Forward: Legal Update for Assisted Living

In this session, attendees will get the opportunity for a “free-for-all” discussion of pressing legal topics for assisted living facilities. Attendees are encouraged to bring their questions and participate in a lively interactive discussion.

Learner Objectives:

- List the hot legal trends for assisted living facilities.
- Discuss what facilities should be focusing on for compliance.
- Identify the recent trends coming out of the Division of Quality Assurance.

Learner Level: Intermediate

NAB/NCERS: 1.5 CEU

NASBA: 1.5 CPE

Field of Study: Business Management & Organization

Program Prerequisites: None

Advance Preparation Needed: None

Presenters: Robert J. Lightfoot, Shareholder, Chair, Long-Term Care, Assisted Living and Independent Senior Housing Practice Group, Reinhart Boerner van Deuren, s.c., Madison, WI; Tristan Dollinger, Attorney, Health Care and Corporate Law, Reinhart Boerner van Deuren, s.c., Milwaukee, WI



D24

A Look Ahead: Emerging Trends for the Future of Senior Living

Join us for a “Shark Tank” style interactive session, which will explore emerging trends categories for senior living, including trends such as staffing efficiency, robotics, resident and staff safety, virtual care, and more, while also providing a deeper dive into both current and future solutions that will help move the sector forward.

Learner Objectives:

- Identify emerging trends for the future of senior living.
- Explore current and future solutions for the market.
- Discuss new solution pilot and testing strategies.

Learner Level: Intermediate

NAB/NCERS: 1.5 CEU

NASBA: 1.5 CPE

Field of Study: Information Technology

Program Prerequisites: None

Advance Preparation Needed: None

Presenter: Justin Smith, Innovation and Technology Manager, Direct Supply Inc., Milwaukee, WI



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Thursday, May 5 - Evening of Entertainment

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

Hor d'oeuvres during the Hospitality Reception
(Sponsored by Hoffman Planning Design & Construction)

5:00 p.m. to 10:30 p.m.

Beverages throughout the Evening (Sponsored by CLA - CliftonLarsonAllen)

6:00 p.m. to 7:30 p.m.

Dinner (Sponsored by Compeer Financial)

7:30 p.m. to 10:30 p.m.

Entertainment and PAC Fundraiser featuring Piano Fondue (Sponsored by Martin Bros.)



Piano Fondue, based in Madison, Wisconsin, is high-energy, interactive entertainment. This unique dueling pianos show is all about having a great time while supporting the LeadingAge Wisconsin Political Action Committee (PAC). It's a rock-and-roll, singalong party, and the song list is entirely up to you! But every song they play needs money attached to it. Don't worry - every dollar brought up to the pianos is handed over at the end of the night to ensure the collective voice of LeadingAge Wisconsin is recognized and heard in the political arena. These piano players don't mess around. If you want that song played soon, you are going to have to pony up! Support your friends and coworkers, or work to thwart their hopes and dreams. Piano Fondue will play what you tell them to - good, bad, or ugly! Remember, the Piano Fondue party is all about extending the effectiveness of the LeadingAge Wisconsin PAC and, by the end of the night, we will celebrate what we have accomplished as a group. Also, because we know it's going to be a rowdy crew, we are bringing in a party DJ to end the night with a bang, so bring those dancing shoes!

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Dan Nolde
VP, Employee Health & Benefits
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Diamond Sponsor**Hors d'oeuvres for the Hospitality Reception**

Thursday, May 5, 2022 -- 5:00 p.m. to 6:00 p.m.

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Diamond Sponsor**Beverages throughout the Evening**

Thursday, May 5, 2022 -- 5:00 p.m. to 10:30 p.m.

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Thursday, May 5, 2022 -- 6:00 p.m. to 7:30 p.m.

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For more information, contact Bob Madsen or Todd Kampa at 844-426-6733, or visit us at Compeer.com/MissionFinancing.

Diamond Sponsor**Entertainment Featuring
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Thursday, May 5, 2022 -- 7:30 p.m. to 10:30 p.m.

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Friday, May 6 - 8:15 a.m. to 9:45 a.m.



E25

Gain Momentum by Consolidating Operations

The workforce crisis is forcing long-term care providers to pursue increasingly creative strategies to realize new efficiencies. In this session, you will learn how and why two long-term care organizations utilized consolidation, collaboration, and scale to improve operational efficiency by reducing redundant personnel and processes.

Learner Objectives:

- Identify the components of a good consolidation strategy that focuses on collaboration and relationships.
- Discuss operations that are well suited for consolidation, collaboration, and partnerships.
- Analyze how much time and money can be saved by pursuing consolidation.

Learner Level: Intermediate

NAB/NCERS: 1.5 CEU

NASBA: 1.5 CPE

Field of Study: Business Management & Organization

Program Prerequisites: None

Advance Preparation Needed: None

Presenters: Dennis Ferger, CEO, Clement Manor, Inc., Greenfield, WI; David Fulcher, President/CEO, Milwaukee Catholic Home, Milwaukee, WI



E26

The Basics of Medicaid Applications and the Role of the ADRC

This session will provide learners with the basic process of applying for Medicaid benefits in Wisconsin and the role of your county's ADRCs in assisting residents in this process. Information presented will include the basics of the application, spousal impoverishment, and spend down of assets.

Learner Objectives:

- Discuss how to explain the Medicaid application process to residents and families.
- Identify when Medicaid discussions/applications should begin.
- Outline how your county's ADRC help with Medicaid applications.

Learner Level: Basic

NAB/NCERS: 1.5 CEU

NASBA: 1.5 CPE

Field of Study: Specialized Knowledge

Program Prerequisites: None

Advance Preparation Needed: None

Presenter: Tracy Fischer, CSW, ADRC Manager, ADRC of Dunn County, Menomonie, WI

Friday, May 6 - 8:15 a.m. to 9:45 a.m. (continued)



E27

Gaining Momentum: Rolling Forward with Staff Competencies (Part 1)

Tackling staff competencies can feel overwhelming to even the most seasoned nurse leaders. Join us in this interactive, two-part session and let us help lighten your load! Our goal is to provide participants with tools, resources, and strategies for operationalizing staff competencies. We will consider topics such as identifying learning styles for adult learners, how to ensure competency in your contracted staff, and the benefits of an effective ongoing audit process. We will address the benefits of ensuring your staff competencies in both your skilled nursing facilities and assisted living settings. The first session in this two-part series will focus on establishing a staff competency process that is both interdisciplinary and sustainable.

Part two (Session F33) will be a deep dive into implementation. Participants will explore practical tips for initial staff education as well as how to integrate audits into daily operations. Come ready to share your struggles and successes with managing staff competencies. You will be provided example templates to help on your journey of implementing a meaningful and effective process for ensuring quality of care through staff competencies.

Learner Objectives:

- Discuss the importance and benefits of staff competency assurance.
- Identify triggers for your organization to examine staff competency and sufficiency.
- Discuss how to effectively evaluate your facility assessment and link it to staff competency needs.
- Identify “community gaps” when evaluating educational opportunities and competencies.

Learner Level: Intermediate

NAB/NCERS: 3.0 CEU (for completing both parts of the workshop -- Session E27 and Session F33)

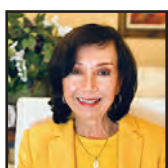
NASBA: 3.5 CPE (for completing both parts of the workshop -- Session E27 and Session F33)

Field of Study: Business Management and Organization

Program Prerequisites: None

Advance Preparation Needed: None

Presenters: Lisa Gervais, RN, NHA, Consultant, Premier Health Care, LLC, Merrill, WI; Amy Veldt, RN Consultant, Pinnacle Innovative Healthcare Solutions, LLC, Black Creek, WI



E28

Foreign-Born PERM Workforce: The Key To Future Momentum

In the headlights of a diminishing labor force, the long-term care environment is losing momentum in the race for survival while there are tens of thousands of individuals eager to come to the USA legally. All they need is you! Learn how to create your own team stability, success, and momentum.

Learner Objectives:

- Define and discuss PERM Immigration.
- Explore what is involved in PERM Immigration.
- Outline the process of getting ready for arrivals.

Learner Level: Basic

NAB/NCERS: 1.5 CEU

NASBA: 1.5 CPE

Field of Study: Personnel/Human Resources

Program Prerequisites: None

Advance Preparation Needed: None

Presenters: Mito Bitong, Recruitment Director, International Manpower Connection, Woodland Hills, CA; Len Fast, NHA, Administrator, Care & Rehab, Barron, WI

Friday, May 6 - 8:15 a.m. to 9:45 a.m. (continued)



E29

Respiratory Protection and Qualitative Fit Testing (Part 1)

This session will provide an overview of OSHA respiratory protection standard 1910.134. During the session, attendees will learn about the importance of medical evaluations, respirator selection, proper use of a respirator including donning and doffing, how to perform a qualitative fit test, and what to do if a staff member cannot pass the qualitative fit test process. (This discussion will continue in Session F35.)

Learner Objectives:

- Outline the requirements of OSHA respiratory protection standard 1910.134.
- Discuss the importance of medical evaluations.
- Demonstrate how to perform a qualitative fit test.

Learner Level: Intermediate

NAB/NCERS: 3.0 CEU (for completing both parts of the workshop -- Session E29 and Session F35)

NASBA: 3.5 CPE (for completing both parts of the workshop -- Session E29 and Session F35)

Field of Study: Personal Development

Program Prerequisites: None

Advance Preparation Needed: None

Presenters: Kelli Rush, MPH, COVID-19 Consultation, Wisconsin State Laboratory of Hygiene – UW Madison, Madison, WI; Robert Vercellino, MSOH, CIH, CSP, WisCon Consultant, Wisconsin State Laboratory of Hygiene – UW Madison, Madison, WI



E30

Doing More with Less: Shifting Momentum in your Dining Program

Dining leaders need to discover new ways to get more done with less. This program will give you the tips, tricks, and knowledge to implement the strategies your dining program needs to run effectively and efficiently while keeping your resident satisfaction and budget goals in mind.

Learner Objectives:

- Identify the technology options to improve dining operations.
- Explore approaches to reinvigorate excitement in senior living dining programs.
- List the tools and resources available to efficiently execute meal service in your senior living community.

Learner Level: Intermediate

NAB/NCERS: 1.5 CEU

NASBA: 1.5 CPE

Field of Study: Business Management & Organization

Program Prerequisites: None

Advance Preparation Needed: None

Presenters: Christy Edwards, Marketing Dietitian, Martin Bros Distributing, Cedar Springs, IA; Chef Steve Tiezzi, Corporate Chef, Martin Bros Distributing, Cedar Springs, IA

Friday, May 6 - 10:00 a.m. to 11:30 a.m.



F31

Stabilizing and Developing a Sustainable Workforce through Immigration

As organizations look for long-term solutions to workforce, immigration is becoming a growing option. At this session, learn from organizations on options and requirements to develop this as a solution for stabilizing current workforce challenges and providing a sustainable workforce for the future.

Learner Objectives:

- Discuss what an experienced organization has learned about navigating immigration as an option.
- Outline how to invoke immigrants into your organization and community.
- Identify options for securing staff through immigration.

Learner Level: Intermediate

NAB/NCERS: 1.5 CEU

NASBA: 1.5 CPE

Field of Study: Personnel/Human Resources

Program Prerequisites: None

Advance Preparation Needed: None

Presenters: Ken Arneson, President & CEO, Evergreen Retirement Community, Oshkosh, WI; Bill Lowe, President & CEO, Chicago Methodist Senior Services, Chicago, IL



F32

Collecting Accounts Receivable: Tips and Tactics to Help Protect Your Facility's Bottom Line

This session will focus on providing real work, pragmatic "tips and tactics" to help your facility collect large and/or small past due balances from residents, including (1) the categories of information to have secured from the resident and/or the resident's agents (i.e., POAs) to assist with collections; (2) the optimal time to place a claim for collection; (3) the optimal time to seek a judgment lien against the resident and/or a responsible party for the resident; and (4) a brief snapshot of the external collections process, from the initial demand, through the lawsuit, to securing judgment, and concluding with the post-judgment collections processes.

Learner Objectives:

- Identify what information you should secure from the resident within the residency agreement to put your organization in the best position to collect a past due balance later.
- Outline the external collections process and discuss how each facility can foster the external collections partners when a claim is being collected.
- Discuss when to seek assistance from external collections counsel as well as the optimal time to proceed with a lawsuit so that the organization can secure a judgment lien.

Learner Level: Intermediate

NAB/NCERS: 1.5 CEU

NASBA: 1.5 CPE

Field of Study: Business Law

Program Prerequisites: None

Advance Preparation Needed: None

Presenter: Bill Rinehart, Jr., Managing Partner, Rinehart Scaffidi & Rinehart, LLC, Milwaukee, WI

Friday, May 6 - 10:00 a.m. to 11:30 a.m. (continued)



F33

Gaining Momentum: Rolling Forward with Staff Competencies (Part 2)

Discussion will continue from Session E27.

Presenters: Lisa Gervais, RN, NHA, Consultant, Premier Health Care, LLC, Merrill, WI; Amy Veldt, RN Consultant, Pinnacle Innovative Healthcare Solutions, LLC, Black Creek, WI



F34

Workforce Has Changed: How Do We Change With It?

Three simple words have shaped the world of work since 2021: *The Great Resignation*. The changes in lifestyle brought on by the pandemic led many to rethink how, where, and why they work. Resignations continue, vacancies increase, and organizations are trying everything they can to address workforce challenges. This session will focus on the impact of *The Great Resignation* on your organization and what you can do to address it.

Learner Objectives:

- Define “The Great Resignation” and discuss what has changed in the workforce.
- Analyze what this means for your organization.
- Identify new and innovative ways to address workforce challenges in your organization.

Learner Level: Advanced

NAB/NCERS: 1.5 CEU

NASBA: 1.5 CPE

Field of Study: Business Management & Organization

Program Prerequisites: None

Advance Preparation Needed: None

Presenter: Aimeé Louw, Director, Customer Solutions, LAK Group, Brookfield, WI



F35

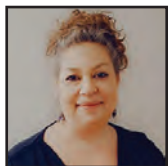
Respiratory Protection and Qualitative Fit Testing (Part 2)

Discussion will continue from Session E29.

Presenters: Kelli Rush, MPH, COVID-19 Consultation, Wisconsin State Laboratory of Hygiene – UW Madison, Madison, WI; Robert Vercellino, MSOH, CIH, CSP, WisCon Consultant, Wisconsin State Laboratory of Hygiene – UW Madison, Madison, WI



Friday, May 6 - 10:00 a.m. to 11:30 a.m. (continued)



F36

Innovations in Activities: Flow Art Abstract Vases

This session will walk you through the process of creating a beautiful, abstract acrylic pour painting. The techniques used commonly are referred to as fluid art, flow art, or pour painting. The item you create in this session will be a stunning masterpiece, which is uniquely yours. As an added bonus, you will master the art of pour painting so that you can take this activity back and share it with your residents.

Learner Objectives:

- Outline the history of paint pouring.
- Experiment with different mixing and blending techniques.
- Explore artistic outlets to tap into creativity and imagination.

Learner Level: Beginner

NAB/NCERS: 1.5 CEU

NASBA: 1.5 CPE

Field of Study: Personal Development

Program Prerequisites: None

Advance Preparation Needed: None

Presenter: Carie Rackow, Activity Director, St. Clare Friedensheim Assisted Living, Monroe, WI

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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, including the handouts.

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