

THE GREATER GOOD

REGISTRATION
BROCHURE

LeadingAge™
Wisconsin

2023 LEADINGAGE WISCONSIN SPRING CONFERENCE • LA CROSSE, WI • MAY 3-5, 2023

REGISTRATION
BROCHURE

LeadingAge™
Wisconsin

2023 LEADINGAGE WISCONSIN SPRING CONFERENCE • LA CROSSE, WI • MAY 3-5, 2023

REGISTRATION
BROCHURE

LeadingAge™
Wisconsin

2023 LEADINGAGE WISCONSIN SPRING CONFERENCE • LA CROSSE, WI • MAY 3-5, 2023

2023 LEADINGAGE WISCONSIN SPRING CONFERENCE • LA CROSSE, WI • MAY 3-5, 2023



ZIEGLER SENIOR LIVING FINANCE



Investment Banking



Seed Capital



Financial Risk Management



FHA/HUD Mortgage Banking



Dispositions, Mergers & Acquisitions



Capital & Strategic Planning



Sponsorship Transitions



Research, Education & Thought Leadership

AARON SCHROEDER
DIRECTOR
aschroeder@ziegler.com
414 978 6407

CHRISTIE RAPPL
VICE PRESIDENT
crappl@ziegler.com
312 705 7260



Ziegler

CAPITAL :: INVESTMENTS :: ADVICE

Investment banking services offered through B.C. Ziegler and Company. FHA mortgage banking services are provided through Ziegler Financing Corporation, which is not a registered broker/dealer. Ziegler Financing Corporation and B.C. Ziegler and Company are affiliated and referral fees may be paid by either entity for services provided.

©2023 B.C. Ziegler and Company | Member SIPC & FINRA

The Greater Good

Our world is complex, but our common goal is simple — we dedicate ourselves to creating positive change and improving the lives of older adults wherever they call home. As we focus on a wide and rapidly-evolving range of issues, it is more important than ever to harness the combined power of our mission-driven LeadingAge Wisconsin professionals. That's why aging services leaders from across our state will come together in La Crosse for our 2023 Spring Conference. Across our education program, we will spend time talking about the issues and strategic priorities that matter to us most, and prominent experts will share their experience and vision that is certain to inspire us all. Through the conference sessions you will explore life-changing ideas, and during social events you will build connections and camaraderie. This year will ignite your passion and your purpose to advance your mission for those you serve. Together we are stronger for the greater good.

Register today at <https://cvent.me/kqGrE7> for the 2023 Spring Conference and Annual Business Meeting.

The Greater Good

May 3-5, 2023

La Crosse Center, La Crosse, 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.

Registration Fees

LeadingAge Wisconsin Members/Subscribers	
May 3 - Pre-conference	\$ 35 per person
May 4-5 - Conference	\$310 per person
May 4 only - Conference	\$250 per person
May 5 only - Conference	\$125 per person

Non-Members of LeadingAge Wisconsin	
May 3 - Pre-conference	\$ 70 per person
May 4-5 - Conference	\$360 per person
May 4 only - Conference	\$300 per person
May 5 only - Conference	\$175 per person

These fees reflect the early bird registration fee. If you complete your online registration after April 12, 2023, 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 3 - 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.

Cancellation Policy

Any conference cancellation prior to April 25, 2023 will receive a 100 percent refund of the registration fee. After April 25 2023, if you need to cancel your registration due to survey, illness, or death in your immediate family, please contact LeadingAge Wisconsin (JMashak@LeadingAgeWI.org) to discuss refund options.

Location & Accommodations

La Crosse Center
300 Harborview Plaza
La Crosse WI 54601
608-789-7400

LeadingAge Wisconsin has a room block at eight hotels. Overnight accommodations are available on a first-come-first-served basis.

Best Western Plus

4.2 miles to the La Crosse Center
 509 N Chestnut
 La Crescent MN 55947
 Room rates begin at \$104/night
 Please book your room no later than Sunday, April 2, 2023
 Block Code: LeadingAge Wisconsin
 Reservations: 507-895-1001

Courtyard La Crosse Downtown Mississippi Riverfront

Less than one-half mile to La Crosse Center
 500 Front Street South
 La Crosse, WI 54601
 Room rates begin at \$149/night
 Please book your room no later than Tuesday, April 4, 2023
[Booking Link](#)

GrandStay Residential Suites

Less than one-half mile to La Crosse Center
 525 Front Street North
 La Crosse WI 54601
 Room rates begin at \$99.90/night
 Please book your room no later than Monday, April 3, 2023
 Block Code: LeadingAge Wisconsin
 Reservations: 608-796-1615

Gundersen Hotel and Suites

1.5 miles to the La Crosse Center
 1520 Clinic Court
 La Crosse WI 54601
 Room rates begin at \$129/night
 Please book your room no later than Sunday, April 2, 2023
 Block Code: LeadingAge Wisconsin
 Reservations: 608-793-0200

Hampton Inn & Suites by Hilton

Less than 1 mile to the La Crosse Center
 511 3rd Street North
 La Crosse WI 54601
 Room rates begin at \$149/night
 Please book your room no later than Thursday, April 6, 2023
 Block Code: LeadingAge Wisconsin
 Reservations: 608-791-4004
[Booking Link](#)

Holiday Inn & Suites Downtown La Crosse

Connected via sky walk to La Crosse Center
 200 Pearl Street
 La Crosse, WI 54601
 Room rates begin at \$149/night
 Please book your room no later than Sunday, April 2, 2023
 Block Code: LAW
 Reservations: 608-784-4444
[Booking Link](#)

Home2 Suites by Hilton

Less than one-half mile to La Crosse Center
 210 Jay Street
 La Crosse, WI 54601
 Room rates begin at \$149/night
 Please book your room no later than Sunday, April 2, 2023
 Block Code: LAW
 Reservations: 608-881-6666
[Booking Link](#)

Radisson

Connected via sky walk to La Crosse Center
 200 Second St South, 200 Harborview Plaza
 La Crosse, WI 54601
 Room rates begin at \$160/night
 Please book your room no later than Sunday, April 2, 2023
 Block Code: law23
 Reservations: 608-784-6680
[Booking Link](#)

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 3, 2023

8:00 a.m. to 4:30 p.m.	Registration Open
9:00 a.m. to 11:30 a.m.	LeadingChoice Network All-Member Meeting (<i>LeadingChoice Network members only</i>)
10:30 a.m. to 11:45 a.m.	Networking Meetings There will be networking meetings for: Assisted Living Professionals, Clinical Professionals, Finance Professionals, Human Resource Professionals, Social Service Professionals, and Marketing Professionals
11:45 a.m. to 1:00 p.m.	LeadingAge Wisconsin Board of Directors Meeting
1:15 p.m. to 4:30 p.m. (with a 15-minute break)	Pre-conference Workshops (Details on pages 6-10) PC1 - Strong Assisted Living Leaders Ensure a Great Experience for Residents, Families, and Staff (Sponsored by Value First) PC2 - Managing Your Business Office as a CEO/Administrator PC3 - Innovation Café (Sponsored by Marsh McLennan Agency)
2:45 p.m. to 3:00 p.m.	Break (Sponsored by Greenfield Rehabilitation Agency)
5:00 p.m. to 8:00 p.m.	Welcoming Reception (Sponsored by M3 Insurance and Value First)

Thursday, May 4, 2023

7:00 a.m. to 5:00 p.m.	Registration Open
7:00 a.m. to 8:00 a.m.	Continental Breakfast (Sponsored by Select Rehabilitation)
8:00 a.m. to 9:15 a.m.	Conference Opening & Keynote Address (Details on page 15) <i>Your Year of Wonders: Growing for the Greater Good in 2023</i> (Sponsored by Ziegler)
9:15 a.m. to 10:00 a.m.	LeadingAge Wisconsin Annual Business Meeting (Details on page 15)
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 16-18) A01 - Understanding the Drivers of Senior Living and Delivering on Our Mission (Sponsored by Lument) A02 - Rethinking Stress: Simple Strategies for Rising Above Daily Struggles & Emotional Overload A03 - The Greater Good of Resident Care as It Relates to the Survey Process A04 - Providing Financial Clarity During Chaos A05 - Bureau of Assisted Living Trends and Updates A06 - Increasing Efficiencies with Technology and Robotics
11:15 a.m. to 11:30 a.m.	Break (Sponsored by Specialized Medical Services)
11:30 a.m. to 12:30 p.m.	Six Simultaneous Breakout Sessions (Details on pages 20-22) B07 - Leadership Skills for the Future of Senior Living B08 - Legal Permanent Immigration: The Greater Good for All B09 - Facility Reported Incidents: New Guidance on Reporting and State Agency Investigations B10 - Optimizing the Finance Function B11 - Legal Take on a Regulatory Update B12 - Driving Efficiencies and Enhancing Resident Experience with AI-driven Automation
12:30 p.m. to 1:15 p.m.	Lunch (Sponsored by HealthDirect Pharmacy)

1:15 p.m. to 2:45 p.m.	Six Simultaneous Breakout Sessions (Details on pages 23-25) C13 - <i>Managed Care for the Greater Good</i> C14 - <i>Open Positions? Empty Units? Providing Employee Housing Could Be the Solution</i> C15 - <i>Driving Positive Outcomes through Clinical Operations and Care Management</i> C16 - <i>Focus on Finance in 2023</i> C17 - <i>Take your Grievance Program from Good to Great: Lessons Learned in Survey Citations and Claim Litigation</i> C18 - <i>Will It Go Viral? How to Navigate a Public Relations Crisis</i>
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 26-28) D19 - <i>Care Integration for the Greater Good</i> D20 - <i>Cultivating Well-Being to Be the Greater Good</i> D21 - <i>What Drives Psychotropic Drug Use in the LTC Setting: A Risk Review</i> D22 - <i>Capitation, Risk, and Value-Based Purchasing as Related to Traditional and Alternative Payment Models</i> D23 - <i>Five Steps to Cyber Resilience</i> D24 - <i>Facilities Assessment: Getting Ahead of the Curve -- Preventative vs Reactive</i>
5:00 p.m. to 6:00 p.m.	Hospitality Reception (Details on pages 30-31) (Sponsored by Hoffman Planning, Design & Construction and CLA)
6:00 p.m. to 7:30 p.m.	Dinner (Details on pages 30-31) (Hosted by Compeer Financial)
7:30 p.m. to 10:30 p.m.	Evening of Entertainment (Details on pages 30-31) (Sponsored by Martin Bros. and CLA)

Friday, May 5, 2023

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 32-33) E25 - <i>Embracing Ambiguity: Revisiting Readiness for Risk, Managed Care, and Value-Based Thinking</i> E26 - <i>Do Human Better: From Control to Connection</i> E27 - <i>Clinical Leadership for the Greater Good: Making a Lasting Impact Today and Beyond (Part 1)</i> E28 - <i>Harnessing Your Data to Establish Value-Based Rates</i> E29 - <i>The Basics of Emergency Management in Assisted Living</i> E30 - <i>Engaging Legacy Givers: Hope Is Not a Strategy. Using Data Is.</i>
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 34-35) F31 - <i>Should I Stay or Should I Go: What to Do with My SNF?</i> F32 - <i>The Wellbeing Advantage: Secrets to a More Productive Workforce</i> F33 - <i>Clinical Leadership for the Greater Good: Making a Lasting Impact Today and Beyond (Part 2)</i> F34 - <i>Formulating Strategic Decisions from Market Data</i> F35 - <i>How to Carry Out an Emergency Management Program</i> F36 - <i>Relationship-Based Fundraising 101: The Art and Science</i>
11:30 a.m.	Adjournment

Wednesday, May 3 - 1:15 p.m. to 4:30 p.m. (with a 15-minute break)



PC1

Strong Assisted Living Leaders Ensure a Great Experience for Residents, Families, and Staff

A flourishing assisted living community starts with strong leadership. Confident, empathetic leaders understand that knowledge and compassion can be the foundation of the decision-making process. Successful leaders are able to blend regulatory compliance with the “soft skills” of customer service and employee engagement resulting in stellar experiences for residents, families, and staff. This workshop will be the first session in a series of four designed to help assisted living managers/administrators to enhance their leadership skills and their ability to manage an assisted living community. In this first session, we will explore customer service and employee engagement. We also will introduce the concept of a facility assessment. Participants will begin to develop and refine the facility assessment for their organization. Future sessions will build on these concepts as we explore how to operationalize the facility assessment as it relates to assessments, policies/procedures, care delivery, education, competencies, and audits. (The four-part series will continue with seminars in June, July, and August. Registration and additional fee information for these remaining sessions will be sent separately.)

Learner Objectives:

- Define the concepts of customer service/concierge service and emotional intelligence.
- Discuss how to better manage staffing and scheduling challenges.
- List the components of a facility assessment and outline how the facility assessment relates to the program statement, admission/discharge criteria, policies/procedures, staffing, staff development, and competencies.
- Outline a facility assessment for your assisted living community.

Learner Level: Intermediate

Presenters: Amy Veldt, RN Consultant, Pinnacle Innovative Healthcare Solutions, LLC, Black Creek, WI; Lisa Gervais, BSN, RN Consultant, Premier Healthcare Consulting, Merrill, WI; Teresa Gatto, Chief Operating Officer, Clement Manor, Inc., Greenfield, WI; Robin Wolzenburg, BSN, RN, Vice President of Housing and Clinical Services, LeadingAge Wisconsin, Madison, WI

Diamond Sponsor

Pre-conference Workshop PC1

Strong Assisted Living Leaders Ensure a Great Experience for Residents, Families, and Staff

Sponsored By



Value First

204 S Hamilton Street

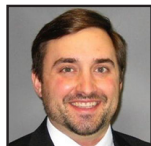
Madison, WI 53703

608-609-6964 • www.value1stonline.com

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.

Wednesday, May 3 - 1:15 p.m. to 4:30 p.m. (continued)

(with a 15-minute break)



PC2

Managing Your Business Office as a CEO/Administrator

This workshop will provide specific guidance to CEOs and administrators to ensure your business office operates effectively and efficiently. You will explore an efficient and effective financial statement process, examine how to use technology to maximize accounts receivable results, and learn the keys to a successful Medicaid cost report desk review.

Learner Objectives:

- Cite examples of leveraging technologies to gain efficiencies and streamline financial system procedures.
- Identify the keys to an efficient month-end close process.
- Discuss how to prepare in advance for an audit, including the likelihood of collectability of accounts receivable and Medicare allowable bad debt.
- Outline how your cost report impacts your Medicaid rates.

Learner Level: Intermediate

Presenters: Barbara Bell, CPA, CMA, Director, Wipfli LLP, Green Bay, WI; Chad Hable, CPA, Manager, Wipfli LLP, Eau Claire, WI; Larry Lester, Principal, Wipfli LLP, Eau Claire, WI; Rob Schlicht, Director, Wipfli LLP, Milwaukee, WI

PC3

Innovation Café

Our Innovation Café is back by popular demand! Based on the World Café model, this forum will feature 17 innovative ideas your peers have successfully launched in their organizations. The forum will feature six rounds and you will select the idea you want to explore in each round. Each discussion leader will spend 15-20 minutes discussing what the idea/program is, how it works, and what the outcome is. Attendees will have 10 minutes to ask questions of the discussion leader. Every 30 minutes the attendees will move to another table to explore another new idea. The featured innovations are detailed below.

Learner Objectives:

- Identify two new ideas you would like to launch in your organization.
- List the steps necessary to launch each of these new ideas.
- Discuss the outcomes you can expect to realize by launching these new ideas.



Center for Enrichment: One component of living a fully engaged life is being mentally, socially, and physically active as we age. The Center for Enrichment takes all of this into consideration and incorporates it into programming. An individual can find classes in history, astronomy, science, current events, tai chi, yoga, aqua fit, and more throughout the year. Classes are taught by volunteers – many retired teachers as well as local professors and members of local organizations. Classes are available for residents but we found they play a valuable role in bringing in potential residents because our center serves the local community.

Presenter: Kristy Beyer, Program Manager, Clement Manor, Inc., Greenfield, WI



“How To Be” Manuals: All key leaders at Lutheran Home and Harwood Place have created a manual on their role, which calendars responsibilities for the full calendar year. Lutheran Home did this as a strategy for successful succession planning and to mitigate the risk of tribal knowledge when someone leaves the organization.

Presenter: Kathy Cavers, President & CEO, Lutheran Home & Harwood Place, Wauwatosa, WI

Wednesday, May 3 - 1:15 p.m. to 4:30 p.m. (continued) (with a 15-minute break)



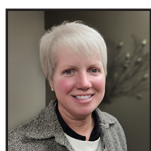
Turnover Early Warning: Employee retention is imperative for long-term care and assisted living providers. Millions of dollars and incredible amounts of time and energy have been spent on improving employee satisfaction and engagement, but the crisis still persists. Employee commitment has been identified as a root cause of employee engagement and satisfaction. This innovative practice will explore how to use commitment to improve the effectiveness of satisfaction and engagement practices already in place while guiding the decisions about new practices. Participants will identify the three types of commitment present among your employees and learn ways to increase the desired or most effective types of commitment in your workforce.

Presenter: Robert Frediani, Consultant, CLA, Milwaukee, WI



Code Honor: The Code Honor program at Clearview honors a resident at the time of death. The program not only promotes closure and dignity but also celebrates that resident's life, and it reassures the family that their loved one was cared for and cared about at Clearview. Participants at this discussion will acquire information about the Code Honor program; resources to help staff navigate challenging advanced care planning conversations; guidelines to help resolve ethical issues; and tips to help create a comprehensive, holistic advanced care plan.

Presenter: Alyssa Gahlman, Director of Social Services, Clearview, Juneau, WI



Recruiting Refugees: Join this round table to learn about experiences and successes related to networking with referral agencies and recruiting/placing refugees.

Presenter: Kari Hawkinson, Vice President of Human Resources, Miravida Living, Oshkosh, WI



Wheelchair Accessible UTVs: Norseland Nursing Home purchased a utility task vehicle (UTV) to enhance residents' recreational experience. The UTV can hold up to four wheelchairs and one non-wheelchair resident simultaneously. The Norseland recreation team uses the UTV to take residents to the local coffee shop, community sporting events, and to reminisce as they cruise through their old neighborhoods. Norseland will be showcasing the UTV at the Innovation Cafe. Participants will learn how to fund raise for a UTV and how to build your social media account to drive donations and community investment in the local nursing home.

Presenter: Angealic Kaye, Recreation Therapist, Bethany St. Joseph Corporation, Westby, WI



Creative Scheduling/Support Help: Join this discussion to learn how one of your peers found creative ways to handle staffing challenges by cross training personal care assistant (PCA) staff from two affiliated assisted living communities and integrating an affiliated long-term care community in a neighboring community. Learn about the formal agreement newly hired PCAs sign explaining the expectations of floating to their secondary neighborhood when additional support is needed.

Presenter: McKenzie Krohn, Director of Life Enrichment, St. Paul Elder Services, Inc., Kaukauna, WI

Wednesday, May 3 - 1:15 p.m. to 4:30 p.m. (continued) (with a 15-minute break)



Leadership Development: Discover how you can implement a leadership development program for your organization that trains on issues such as management versus leadership, conflict resolution, how to have difficult conversations, utilizing a personality test to enhance your our team, the six thinking hats, and diversity/bias training.

Presenter: Carly Loewus, Campus Administrator, Clement Manor, Inc., Greenfield, WI



Best Practices for Saving Money: Presenters in this session will share cost studies and best practices that have saved providers money on product purchases or services (for example monthly elevator service, food purchases, and sharps/waste management) through the Value First group purchasing organization.

Presenters: Denise May, Regional Purchasing Consultant, Value First/LeadingAge Wisconsin, Madison, WI; Trish Korsgren, Director of Business Development, Value First, St. Paul, MN



Peer Mediation: Does your community sporadically experience episodes of discontent, issues between co-workers, and gossip? Do these episodes sometimes go unaddressed by staff thereby causing retention issues and a negative culture? This presentation will provide you with the tools and resources you need to address interpersonal situations independently through conflict training and a peer mediation program. The peer mediation program involves an application process to find the peer mediators, a train-the-trainer program for the designated mediators, and ground rules for the mediation sessions. The goal of this program is to promote peer relationships, positivity, and independent problem solving.

Presenter: Heidi McGeehan, Campus Administrator, Christian Community Homes, Hudson, WI



Navigating Increased Health Care Premiums: Responding to a proposed 75 percent increase in group health insurance premiums, Miravida Living moved its employee group health to an Individual Coverage Health Reimbursement Arrangement (ICHRA). The ICHRA allows the employer to provide defined non-taxed reimbursements to employees for qualified health insurance costs. Join us to make sense from what might appear to be a complicated health insurance solution.

Presenters: Sarah Sklamberg, Sales Executive, Dimond Bros. Insurance, Oshkosh, WI; OJ Morgan, Employee Benefits Sales Executive, Dimond Bros. Insurance, Oshkosh, WI

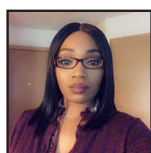


Resident Engagement: Get engaged! Join us to learn how you can improve activity attendance and resident engagement while offering new activities with increased staff involvement.

Presenter: Jennie Orman, Campus Administrator, Christian Community Homes, Hudson, WI



Wednesday, May 3 - 1:15 p.m. to 4:30 p.m. (continued) (with a 15-minute break)



Person-Centered Care for Persons with Dementia: Person-centered dementia care empowers individuals with dementia by recognizing their abilities before looking at their challenges or their diagnosis of dementia. Join us to learn how you can enrich the lives of individuals living with dementia by offering programs tailored to their individual capabilities.

Presenter: Christina Robinson, Activity Director, Miravida Living, Oshkosh, WI



Partners in Pastoral Care: The Director of Pastor Care at Skaalen Retirement Community recognized a need of spiritual care and accompaniment for residents and staff that he could not accomplish alone. He established a "Partners in Pastoral Care" group, in which he enlisted several independent living residents. Individuals within this group (some of whom had previous counseling experience) make visits and help develop and facilitate care plans. This program allows independent residents an opportunity to employ their gifts and find purpose in retirement. Join us to learn about this innovative program as well as the importance and role of pastor care in retirement communities.

Presenter: James Salimes, Pastoral Care Director, Skaalen Retirement Community, Stoughton, WI



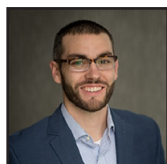
Integrative Medicine: If you are open to considering how integrative medicine can complement traditional medical treatments, this is the discussion for you. You will learn the hows and whys of integrative methods such as aromatherapy, healing touch, It's Never 2 Late, and the Somatron chair to enhance the life of the residents you serve.

Presenter: Lesley Tavs, CBRF House Manager, Elijah's Place, Oshkosh, WI



Implementing an Employee Wellness Program: Implementing a long-term wellness program can add impact to recruitment and retention. There are multiple steps that are involved in getting a team off the ground and there are established, effective layouts for success. Through this discussion, you will learn ways to lay the groundwork, gain momentum, and establish a successful committee that can make a positive impact on staff wellbeing and happiness, which can lead to sustained retention. Discover how Skaalen grew their program over eight years to achieve award winning success and now have advanced to a platform for metrics, engagement, education, and even 1:1 coaching.

Presenters: Renee Taylor, Clinical Nutrition Manager, Wellness Chair, Skaalen Nursing and Rehabilitation Center, Stoughton, WI; Tyler Stuntebeck, Population Health & Wellbeing Manager, M3 Insurance, Verona, WI



Check Ins: Lutheran Home and Harwood Place discontinued the performance evaluation process for all employees in favor of meaningful check ins that are done with each employee every six months. The check in questions/topics change every six months but the format is the same. Recent check in feedback is helping drive the organization's retention and engagement initiatives for 2023.

Presenter: Danielle Unger, Administrator, Lutheran Home & Harwood Place, Wauwatosa, WI

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.

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

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

Please pick up your CEU form at the Attendee Lounge. Listen for a verification code to be announced during each session you attend, and enter the codes on your CEU form.

Please remember to submit your CEU form to the LeadingAge Wisconsin staff before you leave the conference.

Diamond Sponsor

Pre-conference Workshop PC3

Innovation Café

Sponsored By



Marsh McLennan Agency
2725 S Moorland Road
New Berlin, WI 53151

262-305-7928 • www.marshmma.com

Marsh McLennan Agency (MMA) has several offices throughout Wisconsin serving over 250 senior living facilities. MMA provides custom insurance and risk management solutions to your company's specific exposures. We have been providing all types of insurance coverage, including medical benefits, to the senior living industry for over 30 years. Please contact us at 262-305-7928.

Conference Sponsor Refreshment Break

Wednesday, May 3, 2023 -- 2:45 p.m. to 3:00 p.m.

Sponsored By



Greenfield Rehabilitation Agency
3360 Gateway Road, Suite 100
Brookfield, WI 53045
262-923-7101 • www.graw.com

Greenfield Rehab Agency provides physical, occupational, and speech therapy services to senior communities, skilled nursing facilities, home health agencies, and in-home services across Wisconsin. We are a therapist owned and operated company dedicated exclusively to our Wisconsin communities and their residents. Our mission is to provide an exceptional experience for our patients, partners, and team members and live our core values of agility, integrity, and Be the Duck every day.

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 (\$35 for members/subscribers; \$70 for non-members if you register by April 12, 2023) for any of the pre-conference workshops.

There is a separate (per person) registration fee for the 2023 Spring Conference.

What to Wear

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

La Crosse 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.

Financing solutions built on relationships, backed by experience.

D.A. Davidson, a trusted expert in taxable and tax-exempt financing, is dedicated to providing innovative capital markets financing solutions for our senior living clients.



ROMY MCCARTHY
(414) 651-5559



RICK LOHR
(832) 421-2225



OGIEVA GUOBADIA
(832) 421-1905



AMY HAYMAN
(847) 254-7695



D|A|DAVIDSON
FIXED INCOME CAPITAL MARKETS
D.A. Davidson & Co. member SIPC and FINRA

SeniorLiving@dadco.com
(414) 651-5559
dadavidson.com

Diamond Sponsor**Welcoming Reception Beverages**

Wednesday, May 3, 2023 -- 5:00 p.m. to 8:00 p.m.

Sponsored By



M3 Insurance
828 John Nolen Drive
Madison, WI 53713
608-288-2825 • www.m3ins.com

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.

Diamond Sponsor**Welcoming Reception Food**

Wednesday, May 3, 2023 -- 5:00 p.m. to 8:00 p.m.

Sponsored By



Value First
204 S Hamilton Street
Madison, WI 53703
608-609-6964 • www.value1stonline.com

Value First is a group purchasing organization 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.

Diamond Sponsor**Continental Breakfast**

Thursday, May 4, 2023 -- 7:00 a.m. to 8:00 a.m.

Sponsored By



Select Rehabilitation
2600 Compass Road
Glenview, IL 60026
847-441-5593 • www.selectrehab.com

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

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

Diamond Sponsor**Refreshment Break**

Thursday, May 4, 2023 -- 10:00 a.m. to 10:15 a.m.

Sponsored By



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

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

Diamond Sponsor**Deluxe Conference Name Badge Booklets with Conference Schedule***Sponsored By***WIPFLI****Wipfli LLP****10000 W Innovation Drive, Suite 250****Milwaukee, WI 53226****414-431-9300 • www.wipfli.com**

Wipfli's team of health care consultants help organizations to see an increasingly complex landscape with clarity and confidence. From improved financial operations and regulatory compliance to digital transformation and talent management, our health care specialists provide the unique solutions to health care organizations, including senior living, home health, and hospice agencies. Learn more at wipfli.com/health-care.

At Wipfli, we believe perspective changes everything. Our team of senior living consultants bring solutions based upon health care knowledge. We bring those perspectives together to find unique solutions to your most pressing problems. Our services include:

- Audit and Accounting services
- Capital & Facility Planning (Market Analysis and Feasibility Studies)
- Digital Transformation (HER, Cybersecurity, Data Analytics)
- Organizational Performance (Change Management, Leadership Development)
- Revenue cycle
- Reimbursement
- Tax planning and compliance

Insurance & Benefits Solutions

MMA offers Senior Living experts who deliver smarter solutions

- Customized recruitment/retention solutions
- Proactive HR management assistance
- Risk management audits
- Safety training resources and seminars
- Reserved markets only available to MMA senior living clients

To learn how MMA delivers a more focused approach, contact one of our Senior Living Specialists.



**Marsh McLennan
Agency**

Your future is limitless.™

Scott Naze
President
scott.naze@marshmma.com

Dave Hosack
VP, Business Insurance
dave.hosack@marshmma.com

John Sarcia
Account Executive
john.sarcia@marshmma.com

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



Thursday, May 4 - 8:00 a.m. to 9:15 a.m.



Keynote

Your Year of Wonders: Growing for the Greater Good in 2023

This exciting, evidence-based message on the fascinating way our brains are wired to unleash creative superpowers in the face of disruption and uncertainty has helped hundreds of thousands of leaders transform seasons of change into periods of unprecedented growth.

Learner Objectives:

- Discuss how you will inspire transformation in your workplace by changing the way your team thinks about change.
- Develop a strategy to identify unproductive projects and double-down on high-impact opportunities.
- Apply a three-part decision process for quickly and effectively bridging the gap between strategy and execution.

Learner Level: Basic

Presenter: Nick Tasler, Internationally Acclaimed Thought Leader, Organizational Psychologist, #1 Best-Selling Author, Decision Pulse LLC, Coto Laurel, PR

Thursday, May 4 - 9:15 a.m. to 10:00 a.m.

LeadingAge Wisconsin 2023 Annual Business Meeting

This is your association. Join us to celebrate our successes over the past year. Learn how we will work towards the greater good throughout senior services and supports during the year ahead. Elect the individuals who will serve on the LeadingAge Wisconsin Board of Directors.

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.

Diamond Sponsor

Keynote Address Featuring Nick Tasler

Thursday, May 4, 2023 -- 8:00 a.m. to 9:15 a.m.

Sponsored By



Ziegler

CAPITAL :: INVESTMENTS :: ADVICE

Ziegler

790 N Water Street, Suite 2275
Milwaukee, WI 53202
414-978-6407 • www.ziegler.com

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 clients, including investment banking, financial risk management, merger and acquisition services, investment management, seed capital, FHA/HUD, capital and strategic planning, and sponsorship transitions, as well as senior living research, education, and communication.

Thursday, May 4 - 10:15 a.m. to 11:15 a.m.



A01

Understanding the Drivers of Senior Living and Delivering on Our Mission

What are the lessons learned from the challenges of the last three years? How has Covid changed the way we must engage with our staff? How does the new understanding of what drives health outcomes and the movement of health to the home create new opportunities for senior living providers? What role should data and technology play in serving our customers? Come learn about the drivers of senior living and what they mean for your organization.

Learner Objectives:

- List the lessons learned from the challenges of the last three years.
- Analyze the difference between a transactional relationship with our hourly employees versus a relationship based on understanding and empathy, and discuss why this difference is critical to attract and maintain good employees.
- Discuss the opportunity for senior living providers in value-based care and the move to bring health care to the home.

Learner Level: Advanced

Program Prerequisites: This session is designed for individuals who are serving in leadership roles in their organization.

Advance Preparation Needed: If possible, attendees should do at least one of the following:

- Read NIC blog series: "[Six Key Driver's Shaping the Future of Senior Living](#)"
- Listen to NIC Chats Podcast with Bob Kramer: "[Six Key Driver's Shaping the Future of Senior Living](#)"
- Watch "[Bob Kramer Explains the Drivers that will Shape the Future of Senior Living at the Senior Living Innovation Forum \(SLIF\) in the Bahamas](#)"

Presenter: Bob Kramer, Founder & Fellow, Nexus Insights; Co-founder & Strategic Advisor, NIC, Annapolis, MD

Conference Sponsor

Session A01 Featuring Bob Kramer

Thursday, May 4, 2023 -- 10:15 a.m. to 11:15 a.m.

Sponsored By



LUMENT

Lument

7300 W 110th Street, Suite 530

Overland Park, KS 66210

816-965-7442 • www.lument.com

Lument delivers a comprehensive set of capital solutions customized for investors in multifamily, affordable, and seniors housing and health care real estate. Lument is a Fannie Mae DUS®, Freddie Mac Optigo®, FHA, and USDA lender. In addition, Lument offers a suite of proprietary commercial lending solutions. Lument has approximately 600 employees in over 25 offices across the United States. Lument is a brand of ORIX Real Estate Capital Holdings, LLC.

Diamond Sponsor

Refreshment Break

Thursday, May 4, 2023 -- 11:15 a.m. to 11:30 a.m.

Sponsored By



SPECIALIZED MEDICAL SERVICES

Specialized Medical Services

19387 US Hwy 19 North

Clearwater, FL 33764

800-284-2006 • www.lincareltc.com

Specialized Medical Services, the leader in oxygen and respiratory equipment, offers solutions to help care for patients with respiratory challenges. We continue to operate with one goal in mind: to set the standard of excellence in providing respiratory solutions to our patients and long-term care partners.

Thursday, May 4 - 10:15 a.m. to 11:15 a.m. (continued)



A02

Rethinking Stress: Simple Strategies for Rising Above Daily Struggles & Emotional Overload

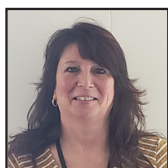
This enlightening session will show you how to whip stress into shape by using incredibly simple strategies to calm you down when you feel overwhelmed, rethink your priorities, and transform your worry into excitement.

Learner Objectives:

- Demonstrate how to use the power of posture to produce peace and confidence.
- Discuss how changing the way you talk will change the way you think.
- Outline how to change your life by making more decisions and fewer plans.

Learner Level: Basic

Presenter: Nick Tasler, Internationally Acclaimed Thought Leader, Organizational Psychologist, #1 Best-Selling Author, Decision Pulse LLC, Coto Laurel, PR



A03

The Greater Good of Resident Care as It Relates to the Survey Process

This session will provide a regulatory update for long-term care providers with a focus on common cites, survey trends, issues on the horizon, what is going well, and practical tips to guide providers through the regulatory requirements.

Learner Objectives:

- Identify the top Wisconsin citations and trends.
- Analyze the survey process with a focus on how to better enhance the survey experience.
- Discuss what is going well in long-term care and list tips for providers in areas that need improvement.

Learner Level: Intermediate

Presenter: Ann Angell, Bureau Director, Bureau of Nursing Home Resident Care, Division of Quality Assurance, Madison, WI



A04

Providing Financial Clarity During Chaos

The need for strong financial leadership and information has never been more important. An increased pace of industry change, employee turnover, and difficult financial results are just a few of the challenges faced by senior living providers. Lacking financial leadership and information, operational leaders rely on experience to make decisions; however, the experience does not incorporate the rapid pace of change to senior living providers. Through a combination of visuals, case study, and discussion, this session will explore how the finance team should change to get the information necessary to improve operating results during chaos.

Learner Objectives:

- Outline methods for releasing monthly financial statements in less time.
- Discuss when and how to prepare daily cash flow and budget forecasting.
- Analyze how to incorporate operational team members in finance discussions.

Learner Level: Intermediate

Presenter: Michael Peer, CPA, CHC, Principal, Health Care and Life Sciences, CLA, Milwaukee, WI

Thursday, May 4 - 10:15 a.m. to 11:15 a.m. (continued)



A05

Bureau of Assisted Living Trends and Updates

This session will include an overview of Wisconsin's assisted living landscape from a Bureau perspective to include notable trends from the past year, observations, promising practices, concerns, department initiatives, and areas for mutual awareness/cooperation between providers and the Bureau.



Learner Objectives:

- Analyze statewide trends in assisted living, including survey and enforcement trends.
- Discuss the state of ongoing Bureau initiatives in assisted living.
- Outline the surveyor perspective of statewide citation trends.

Learner Level: Intermediate

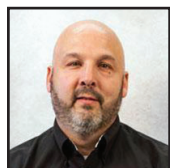
Presenters: Alfred C. Johnson, Deputy Administrator, Division of Quality Assurance, Department of Health Services, Madison, WI; Laura Farah, Health Services Specialist, Bureau of Assisted Living, Division of Quality Assurance, Madison, WI



A06

Increasing Efficiencies with Technology and Robotics

As we look at the many challenges businesses face today, we know that automation and robotics will play a key role in helping them fill gaps (not replace staff), while driving operational efficiency and enhancing the dining experiences they create. We will look at new robots, their features, and cost effectiveness (ROI), including Cleaning Robot, Dust-E, Serving & Busing Robot – Matradee or “Brosie,” and Disinfecting Robot.



Learner Objectives:

- Discuss the role automation and robotics could play in helping organizations achieve operational efficiencies and enhance the dining experience.
- Analyze the ROI for incorporating robots in the dining experience.
- Identify the automation and robotics that would be appropriate for your organization.

Learner Level: Intermediate

Presenters: Christy Edwards, Nutrition & Dining Strategist, Martin Bros. Distributing Co., Sparta, WI; Rob Fiori, Director of Solutions, Martin Bros. Distributing Co, Inc., Polk City, IA

New Conference App

About three weeks prior to the conference, registrants will be emailed information to download the new conference app -- Attendee Hub. Attendees can integrate their social media accounts, sync their conference schedules, set reminders for sessions, access the handouts, rate sessions, share contacts, send messages, navigate the event, and meet our many sponsors. Attendees 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.

The LeadingAge Wisconsin 2023 Spring Conference App Is Sponsored By Baker Tilly, Madison, WI

Diamond Sponsor**Online Registration***Sponsored By***PIPER | SANDLER**

Realize the power of partnership.

Piper Sandler & Co
800 Nicollet Mall, Suite 900
Minneapolis, MN 55402
612-303-6261 • www.pipersandler.com

Piper Sandler Companies (NYSE: PIPR) is a leading investment bank and institutional securities firm serving clients across the U.S. and internationally. Founded in 1895, the firm is headquartered in Minneapolis with 40 offices across the U.S. and in London and Zurich. The Piper Sandler & Co. senior living team helps clients achieve their strategic objectives through comprehensive investment banking solutions, advisory services, capital placement capabilities, in-depth senior living industry knowledge, trading expertise, and strong distribution channels. Our focus on client service has led to extraordinary results and long-term relationships. Learn more at www.pipersandler.com.

Online Registration

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

**Click Here to Register:****<https://cvent.me/Pr1bAD>****Click Here for a Conference Summary:****<https://cvent.me/kqGrE7>**

To qualify for the early registration discount, you must complete and submit your registration by April 12, 2023.

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

Diamond Sponsor**The Attendee Lounge***Sponsored By*

Reinhart
 Boerner Van Deuren s.c. Attorneys at Law

Reinhart Boerner Van Deuren s.c.
22 E Mifflin Street, Suite 700
Madison, WI 53703
608-229-2257 • www.reinhartlaw.com

Reinhart Boerner Van Deuren s.c. is a leader in Wisconsin providing legal services to nursing home and assisted living providers. From regulatory issues to labor and employment, daily operational issues, buying, selling and licensing of facilities, and corporate matters, the Reinhart attorneys are problem solvers. Drawing on their vast experience, both legal and clinical, the trusted advisors at Reinhart know where you're coming from. Representing clients in Wisconsin, regionally, and nationally, the Reinhart attorneys will work side by side with you in an efficient and cost effective manner to help you achieve positive outcomes for your nursing home or assisted living business.

Thursday, May 4 - 11:30 a.m. to 12:30 p.m.



B07

Leadership Skills for the Future of Senior Living

What are the skills, knowledge, and character traits needed by CEOs to be successful in leading not-for profit aging service organizations for the next decade? How can providers proactively prepare their organizations for the future of senior living and not be left behind. Come to this interactive discussion on both the drivers and leadership traits that will shape the future.

Learner Objectives:

- Identify the traits needed by leaders of senior living organizations to be successful in the next decade.
- Engage with your peers on the impact the drivers of senior living will have on your organizations.
- Discuss how to proactively prepare for the drivers that will shape the future of senior living and aging service organizations.

Learner Level: Advanced

Program Prerequisites: This session is designed for individuals who are serving in leadership roles in their organization.

Advance Preparation Needed: If possible, attendees should read at least the first two articles:

- [“Five critical CEO skills for the future”](#) by Bob Kramer, Jacquelyn Kung and Ed Frauenheim
- [“Three things to ‘know’ to develop CEO skills for the future of aging services”](#) by Bob Kramer, Jacquelyn Kung and Ed Frauenheim
- [“7 Principles to Attract & Retain Older Frontline Workers”](#) by Paul Irving, Bob Kramer, Jacquelyn Kung and Ed Frauenheim

Presenter: Bob Kramer, Founder & Fellow, Nexus Insights; Co-founder & Strategic Advisor, NIC, Annapolis, MD



B08

Legal Permanent Immigration: The Greater Good for All

With eight more years of an unprecedented labor force reduction facing the United States, employers across the nation struggle to maintain operations, and many fail. Learn about the role and advantages of legal immigration in the struggle for maintaining your own workforce.

Learner Objectives:

- Outline the process for legal immigration to build your workforce.
- Identify community resources you can tap.
- Develop your plan to prepare for the arrivals of your new workers.

Learner Level: Basic

Presenter: Len Fast, NHA, Administrator, Care & Rehab, Barron, WI

Thursday, May 4 - 11:30 a.m. to 12:30 p.m. (continued)



B09

Facility Reported Incidents: New Guidance on Reporting and State Agency Investigations

We live in a world of constant change, and the regulatory environment of long-term care certainly is no exception. Participants in this session will learn the hows and whys of new reporting requirements for facility incidents and the State's approach to investigations.

Learner Objectives:

- Define what is considered a facility reported incident.
- List the information to include in the initial and final report.
- Outline the new state agency triage criteria.

Learner Level: Intermediate

Presenter: Juli Brandt, RN, Regional Field Operations Director, Southern Regional Office, Bureau of Nursing Home Resident Care, Division of Quality Assurance, Madison, WI



B10

Optimizing the Finance Function

This is the session for you if you are interested in learning how to develop a sustainable finance footprint that is scalable for growth and provides valuable business insights by focusing on how to maximize the value of the finance function through alignment of strategic objectives and becoming a true business partner with the rest of the organization.

Learner Objectives:

- Describe digital transformation trends within the industry and the economy overall.
- Summarize what it means to define a business case for innovative change that supports desired future state.
- Articulate the optimized finance service delivery model and how to become a true business partner within finance (e.g., how to shift from systematic transactional process toward analytical activities).

Learner Level: Intermediate

Presenter: Rick Kes, Health Care Partner, RSM US LLP, Minneapolis, MN



B11

Legal Take on a Regulatory Update

This session will provide a legal perspective of changing regulations. Discussion will focus on regulatory trends, the mechanics of appealing a violation, and abuse and neglect.

Learner Objectives:

- Analyze issues to consider when determining whether to appeal a violation.
- Outline the process -- start to finish -- of appealing a violation.
- List tips for avoiding bad outcomes related to abuse and neglect.

Learner Level: Intermediate

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

Thursday, May 4 - 11:30 a.m. to 12:30 p.m. (continued)



B12

Driving Efficiencies and Enhancing Resident Experience with AI-driven Automation

Artificial intelligence (AI) driven automation is playing a pivotal role in the digital transformation journey of aging services providers to overcome challenges such as staffing shortage, caregiver burnout, poor operational efficiencies, software interoperability, and lower ROIs. During the session, we will look at the basics of AI and its core constituents, and we will follow the journey of robotic process automation (RPA) implementation from envisioning, assessing, and road mapping to implementing automation that creates bi-directional data flows, automates manual processes, bridges software silos, reduces costs, and accelerates digital transformation.

Learner Objectives:

- Analyze the need for AI-driven automation.
- Cite examples of automation use cases.
- State your case for proposing automation to other stakeholders in your organization.

Learner Level: Intermediate

Presenter: Vipin Bhardwaj, CEO, NuAIG, Edison, NJ

Diamond Sponsor

Lunch

Thursday, May 4, 2023 -- 12:30 p.m. to 1:15 p.m.

Sponsored By

HEALTHDIRECT
PHARMACY SERVICES

Personalized care. Direct to you.

HealthDirect Pharmacy Services
3701 E Evergreen Drive, Suite 1000
Appleton, WI 54913
www.hdrxservices.com

Our Pharmacy Commitment to Your Community

HealthDirect's long-term care pharmacy services pair benefits of large pharmacy service providers with the responsiveness of a locally owned and operated pharmacy. Client solutions are engineered by combining the strengths and value of our affiliate companies to create a comprehensive service offering that is unmatched in our space. Ultimately, what we deliver to our partners is a service package that gives them greater sustainability and marketability in an ever-changing long-term care environment.

Appleton Pharmacy
920-739-5900

Brookfield Pharmacy
262-395-4658

Eau Claire Pharmacy
715-832-3780

La Crosse Pharmacy
608-784-6500

Thursday, May 4 - 1:15 p.m. to 2:45 p.m.



C13

Managed Care for the Greater Good

Join us for an interactive discussion with the Family Care MCOs to discover likely scenarios for managing care as our society moves toward more managed care. We will explore the likelihood of continued integration, different perspectives about the future of Family Care, and ideas for building better partnerships between long-term care providers and managed care organizations. From the MCO perspective, we will discuss difficulties that currently hamper care coordination and consider solutions for overcoming these difficulties.

Learner Objectives:

- List practical ideas for achieving better care coordination with the MCOs.
- Compare and contrast your vision for the future of Family Care with the ideas expressed in this discussion.
- Identify solutions for building better partnerships between long-term care organizations and the MCOs.

Learner Level: Intermediate

Facilitator: Karen Sepich, Vice President of Community Services, Bethany St. Joseph Corporation, La Crosse, WI
 Panelists: Mark K. Hilliker, CEO, Includa, Inc., Stevens Point, WI; Meghan Hyland, CAPSW, Enrollment and Eligibility Director, Lakeland Care, Oshkosh, WI; Maria Ledger, CEO, My Choice Wisconsin, Wauwatosa, WI; Tony Mollica, President/CEO, iCare, Milwaukee, WI; Kenneth Munson, CEO, Community Care, Inc., Brookfield, WI



Diamond Sponsor

Refreshment Break

Thursday, May 4, 2023 • 2:45 p.m. to 3:00 p.m.

Sponsored By



Community Living Solutions
 2801 Enterprise Avenue, Suite 202
 Appleton, WI 54913
 612-963-0889
www.communitylivingsolutions.com

Community Living Solutions is an integrated planning, design, and construction services organization solely serving the senior living profession. Our skilled team of planners, architects and construction managers understands the complexity of a project and takes an active partnership approach to all phases of planning and design. This approach ensures a solution that assures we meet your unique market needs while enhancing your financial health for the future.

Thursday, May 4 - 1:15 p.m. to 2:45 p.m. (continued)



C14

Open Positions? Empty Units? Providing Employee Housing Could Be the Solution

Learn from a panel of experts their learnings and insight on the opportunities, challenges, benefits, and must dos when considering employee housing on your campus. This interactive session will tackle key considerations including human resources, design and building code, security, and legalities. Come prepared for lively, informative interaction.



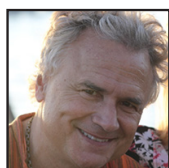
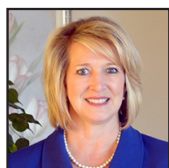
Learner Objectives:

- Discuss the thought process leaders used in deciding to create employee housing on their campus.
- Analyze the design and code implications of changing occupancy type.
- Detail the implications of housing employees on your campus.



Learner Level: Intermediate

Presenters: Amy Duhr, CEO, Grace Lutheran Communities, Eau Claire, WI; Duane Helwig, Partner, Vice President of Design, Community Living Solutions, Appleton, WI; John Huhn, Vice President of Senior Living Operations, Community Living Solutions, Appleton, WI; Pamela Klingfus, CEO, Christian Community Homes and Services, Hudson, WI; Rob Lahammer, Vice President of Engagement and Advocacy, Presbyterian Homes and Services, Roseville, MN



C15

Driving Positive Outcomes through Clinical Operations and Care Management

This presentation will focus on identifying ways to enhance the patient/resident experience, improve quality outcomes, and reduce costs through clinical operation and care management strategies.



Learner Objectives:

- Analyze how clinical operations drive the cost of care and CMS Star Ratings.
- Discuss why leaders must engage in the multidisciplinary approach to achieve results.
- Identify areas of risk and opportunity in the clinical operations arena to sustain results and maintain focus.

Learner Level: Intermediate

Presenters: Beryl Ramsey Finlan, MBA, FACHE, National Leader of Health Care Clinical Operations, RSM US LLP, Houston, TX; Val Howell, MSN, MBA, RN, NEA-BC, Manager, Health Care Consulting Services, RSM US LLP, Houston, TX

Thursday, May 4 - 1:15 p.m. to 2:45 p.m. (continued)



C16

Focus on Finance in 2023

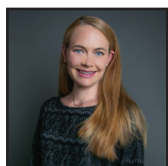
Executing strategic plans requires capital. Efforts to curtail inflation are impacting the cost of capital. How can providers access capital and fund growth today? What are lenders and bond buyers' attitudes toward the providers? Presenters will provide an overview of the current senior living capital markets and financing in 2023.

Learner Objectives:

- Highlight the key sector trends important to finance professionals in the not-for-profit senior living and care sector.
- Discuss the current capital markets and lending environment.
- Outline guidance for providers looking to access capital in 2023.

Learner Level: Intermediate

Presenter: Aaron Schroeder, Director, Ziegler Investment Banking, Milwaukee, WI; Christie Rappl, Vice President, Investment Banking, Senior Living, Ziegler, Minneapolis, MN



C17

Take your Grievance Program from Good to Great: Lessons Learned in Survey Citations and Claim Litigation

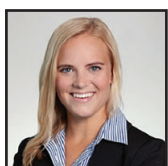
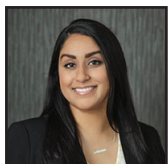
The Bureau of Assisted Living is putting a heightened focus on complaints primarily because complaints in assisted living have been on the rise throughout the pandemic. In this session, you will review the lessons learned from recent survey citations and claim litigation and gain insight on how to enhance your grievance program and reduce the incidence of complaints.

Learner Objectives:

- Analyze the current regulatory and legal landscape of assisted living communities in Wisconsin.
- Discuss how claims and litigation have the ability to arise from grievances and regulatory complaints.
- List practical solutions to improve your organization's grievance program and reduce the number of complaints.

Learner Level: Intermediate

Presenters: Robert F. Rodè, Partner, Voigt, Rodè, Boxeth & Coffin, LLC, St. Paul, MN; Talia Pletcher, LNHA, LALD, Risk Manager, Senior Living and Social Services Practice Group, M3 Insurance, St. Paul, MN; Taylor Goodland, Account Executive, M3 Insurance, Eau Claire, WI



C18

Will It Go Viral? How to Navigate a Public Relations Crisis

Is your organization prepared to face the media and answer the difficult questions when a crisis occurs? The consequences of a poor response can cause major damage to your brand and your bottom line. This session will discuss the importance of controlling the narrative and how you can be prepared to respond quickly and confidently in a crisis.

Learner Objectives:

- Develop your organization's crisis communications plan.
- Demonstrate how to lean into your mission and values as the foundation of your narrative.
- List the three questions you need to answer when responding to a crisis.

Learner Level: Intermediate

Presenter: Nicole Pretre, MS, CPG, President & CEO, Cedar Community, West Bend, WI

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



D19

Care Integration for the Greater Good

Join us for an interactive discussion with hospitals to discover ideas, suggestions, and scenarios for building better and stronger care integrations for the individuals we serve. We will explore the vision different hospitals have for health care in the future and identify what they seek in partnerships with long-term care providers. We will discuss difficulties that currently hamper care coordination and consider solutions for overcoming these difficulties.

Learner Objectives:

- List practical ideas for achieving better care coordination with your local hospital.
- Compare and contrast your vision for the future of health care with the ideas expressed in this discussion.
- Identify solutions for overcoming the difficulties that currently impede care coordination.

Learner Level: Intermediate

Facilitator: Stephanie Chedid, President & CEO, Luther Manor, Wauwatosa, WI

Panelists: Denise Gloede, MSN, RN, President, Post-Acute, SSM Health, Madison, WI; Mallori Strama, Director, Senior Care Services, Aspirus Medford Hospital and Clinics, Medford, WI; Cassie Stremer, Post Acute Care Team Leader, Bellin Health, Green Bay, WI



D20

Cultivating Well-Being to Be the Greater Good

A new skill set is needed to thrive in today's rapidly changing world. Drawing from the fields of mindfulness, positive psychology, and mind-body medicine, this experiential workshop will provide strategies to reduce stress, teach skills to safeguard mental health and strengthen resilience, and explore practices to create a healthy workplace culture.

Learner Objectives:

- Identify skills to bounce back from burnout.
- List practices to strengthen resilience and well-being.
- Implement strategies to develop connection for healthy workplace teams.

Learner Level: Basic

Presenter: Shilagh A. Mirgain, PhD, Distinguished Psychologist, Department of Orthopedics and Rehabilitation, UW Health, University of Wisconsin Hospitals and Clinics, Madison, WI

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



D21

What Drives Psychotropic Drug Use in the LTC Setting: A Risk Review

Have you ever really thought about the reasons psychotropic drug use may be on the rise in the long-term care setting? Admission process, workforce stability, resident demographics? We will analyze factors that may affect psychotropic drug use and risk areas that may be linked to psychotropic drug use in the long-term care setting.

Learner Objectives:

- Identify federal compliance risk areas linked to psychotropic drug use.
- State your understanding of the necessity to embrace root cause analysis and evidence-based practices in risk identification in the long-term care setting.
- Apply key concepts of this session to identify system and process workflows that require modifications.

Learner Level: Basic

Presenter: Lori Koeppel, RN, BSN, NHA, DNS-CT, WCC, Research Analyst, QID, UW Madison School of Medicine, Madison, WI



D22

Capitation, Risk, and Value-Based Purchasing as Related to Traditional and Alternative Payment Models

A large portion of health care funding continues to move toward merging the payer and provider. This session will describe options and opportunities skilled nursing facilities and assisted livings facilities have in this arena. While both LeadingChoice Network members and non-members are welcome, the intended audience is non-members.

Learner Objectives:

- Identify and differentiate at least three capitated financial risk-bearing revenue models for providing care in skilled nursing facilities and assisted living facilities.
- Outline behaviors and practices needed to be financially successful across a spectrum of involvement and risk.
- Discuss current and future opportunities for bonus payments for providing higher-than-average quality of care in value-based contracts.

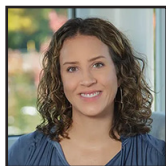
Learner Level: Intermediate

Presenter: Matt Berg, CEO, LeadingChoice Network, Madison, WI

Conference App Banner Sponsors

- **CLA**, 10401 W Innovation Drive, Suite 300, Wauwatosa, WI 53226; 414-721-7580
- **Community Living Solutions**, 2801 Enterprise Avenue, Suite 202, Appleton, WI; 612-963-0889
- **D.A. Davidson & Co.**, 11414 W Park Place, Suite 202, Milwaukee, WI 53224; 414-651-5559
- **Hoffman Planning, Design & Construction**, 122 E College Avenue, Suite 1G, Appleton, WI 54911; 920-731-2322
- **Marsh McLennan Agency**, 2725 S Moorland Road, New Berlin, WI 53151; 262-305-7928
- **Specialized Medical Services**, 19387 US Hwy 19 N, Clearwater, FL 33764; 800-284-2006

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



D23

Five Steps to Cyber Resilience

It is not a matter of “if” your organization will be exposed to a cyber-attack but “when.” This session will address five steps to building cyber resilience in long-term care communities, evolving cyber risks and trends, and strategies to ensure you are covered when a cyber-attack strikes. Participants will learn how to mitigate cyber exposures through preventative controls and formal risk transfer mechanisms.

Learner Objectives:

- Demonstrate your understanding of the cybersecurity risk management framework.
- List baseline cyber controls that long-term care organizations should have in place or consider implementing to mitigate their risk.
- Analyze the role cyber/network security insurance plays in your enterprise-wide cyber risk management strategy.

Learner Level: Intermediate

Presenters: Sara Kekula, Director of Senior Living and Social Services, Senior Account Executive, Partner, M3 Insurance, Madison, WI; Matt Thomson, Director of Cyber Liability, M3 Insurance, Green Bay, WI



D24

Facilities Assessment: Getting Ahead of the Curve -- Preventative vs Reactive

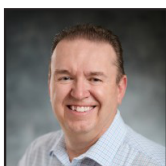
For many years and for many organizations, facilities' maintenance has been an afterthought. Many times, the allocation of resources of dollars, manpower, and priorities has been reactive, running equipment and buildings to failure, and culminating with replacement. Today, technical labor, specialty parts, and high-tech equipment are significantly more costly. This session will explore getting ahead of the curve of failure and planning responsibly for preventative maintenance and capital replacement.

Learner Objectives:

- Create a comprehensive capital asset inventory.
- Develop an assessment plan and implement a basic preventative maintenance schedule.
- Discuss predictive capital maintenance.

Learner Level: Intermediate

Presenters: Jim Benedict, Vice President of Plant Operations, Milwaukee Catholic Home, Milwaukee, WI; Todd Miller, FMP, Vice President of Facility Services, Cedar Community, West Bend, WI



Diamond Sponsor

LeadingAge Wisconsin Conference App

Sponsored By



Baker Tilly

4807 Innovate Lane

Madison, WI 53718

608-712-3286 • www.bakertilly.com

From strategic business planning to development advisory to operational assessments to audit and tax solutions, our collaborative team of senior living, health care, real estate, and technology industry specialists provide custom solutions to establish organizational and financial resiliency as well as fulfillment of the mission critical task of providing high quality care and services to residents.



PIPER SANDLER

Realize the power of partnership

PARTNERING WITH SENIOR LIVING PROVIDERS TO ACHIEVE THEIR FINANCIAL GOALS

As a national leader in the senior living industry, Piper Sandler has delivered best-in-class services and tailored financing solutions to clients for 30 years.

With one of the most comprehensive platforms in the senior living space, our team is able to provide the lowest cost of capital and maximum flexibility for our senior living clients.

- Investment banking
- Direct lending
- Private placements
- Seed capital
- Equity/mezzanine financing
- Capital & strategic planning
- Education & communication
- Investment management
- Financial risk management
- Affiliations, M&A

For more information, please contact:

Jenny Wade

Senior Vice President

612 303 6261

jennifer.wade@psc.com

PiperSandler.com

Since 1895. Member SIPC and NYSE. © 2023 Piper Sandler & Co. 7/22 CM-23-0100

Thursday, May 4 - Evening of Entertainment

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

Hor d'oeuvres for 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 (Hosted by Compeer Financial)

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

Entertainment featuring Mr. Blink (Sponsored by Martin Bros.)

Mr. Blink is a 6-piece Big River Rhythm Rock band from La Crosse, Wisconsin. They are releasing their 4th album, "Shine," in 2023. A 33-year music staple in the Driftless area, their original music is about good times and real people. Danceable and relatable tunes create a happy time at the Mr. Blink shows. Bluegrass fiddle with Cuban congas and honkey tonk piano weave in and around a guitar, bass, and drum section.

We will feature an open mic evening with Mr. Blink. Bring your instrument if you care to play along with the band. Come prepared to sing if you would like to sing along with the band.



Diamond Sponsor**Hors d'oeuvres for the Hospitality Reception**

Thursday, May 4, 2023 -- 5:00 p.m. to 6:00 p.m.

Sponsored By

Planning, Design & Construction, Inc.

Hoffman Planning, Design & Construction, Inc.**122 E College Avenue, Suite 1G****Appleton, WI 54911****920-731-2322 • www.hoffman.net**

Hoffman Planning, Design & Construction is a design-build firm whose mission is to make a positive impact on people's lives and their environment by providing creative ideas and responsible solutions. Through our integrated project delivery method, Total Project Management, we offer senior living providers efficient, healthy, and cost-effective facility solutions. Creating inviting designs that consider the latest trends in senior housing, we help position providers for market success by balancing programmatic, phasing, and financing considerations.

Diamond Sponsor**Beverages throughout the Evening**

Thursday, May 4, 2023 -- 5:00 p.m. to 10:30 p.m.

Sponsored By**CLA****10401 W Innovation Drive, Suite 300****Wauwatosa, WI 53226****414-721-7580 • www.CLAconnect.com**

At CLA, we're experienced in delivering integrated wealth advisory, outsourcing, audit, tax, digital, and consulting services to help you succeed. With a virtual headquarters, our "team of teams" approach allows us to have professionals conveniently located in communities across the country. For us, everything begins with living the CLA Promise, which is to know and help you. We're able to do that because our people are so much more than accountants — they are senior living professionals.

Diamond Sponsor**Dinner**

Thursday, May 4, 2023 -- 6:00 p.m. to 7:30 p.m.

Hosted By**Compeer Financial****2600 Jenny Wren Trail****Sun Prairie, WI 53590****320-345-0120 • www.compeer.com**

Compeer Financial is proud to sponsor the 2023 LeadingAge Wisconsin Spring Conference. At Compeer, we believe in building a stronger rural America, one community at a time. Compeer Financial's Mission Financing team is uniquely positioned to help rural communities prosper by securing financing for their essential community infrastructure needs. The projects we fund help create jobs, add economic strength and diversity, and contribute to the vitality of rural communities. Visit compeer.com to learn more.

Diamond Sponsor**Entertainment Featuring Mr. Blink**

Thursday, May 4, 2023 -- 7:30 p.m. to 10:30 p.m.

Sponsored By**Martin Bros.**
DISTRIBUTING CO INC**Martin Bros. Distributing Co****6623 Chancellor Drive****Cedar Falls, IA 50613****800-847-2404 • www.martinbros.com**

Martin Bros. is a customer-centric, employee-owned full-line food distributor that has been built on the foundation of strong family values. In our over 80-year history, we have made it a priority to listen and partner alongside our customers while identifying long-term foodservice solutions that deliver positive results. We provide legendary customer service through quality, nationally branded products and custom-built tools and resources developed by our team of experts to help you position yourself as a leader in the senior living industry.

Friday, May 5 - 8:15 a.m. to 9:45 a.m.



E25

Embracing Ambiguity: Revisiting Readiness for Risk, Managed Care, and Value-Based Thinking

CMS intends for all Medicare beneficiaries to be in some type of value-based arrangement by 2030. Where does that leave us? What options do we have? While many of the answers are not yet available, there is some clarity around what we can do and what we must do.

Learner Objectives:

- Identify national imperatives around value-based care and provider-based risk.
- Discuss innovative and preparatory value-based efforts that other aging services organizations are pursuing.
- Summarize key opportunity areas that organizations should be exploring and considering.

Learner Level: Intermediate

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



E26

Do Human Better: From Control to Connection

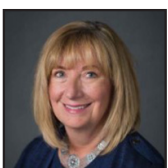
Times of crisis can bring out the best in us or the worst in us. This breakout session will provide you with practical relationship and communication tools to support you in being your most authentic, conscious, and compassionate self in high-stakes situations.

Learner Objectives:

- Discuss the anatomy of power struggles and how to step out of them.
- Cite various empathic communication techniques designed to support the best outcomes in high-stakes situations.
- Develop a needs consciousness that will support you in making powerful requests that move people forward together.

Learner Level: Basic

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



E27

Clinical Leadership for the Greater Good: Making a Lasting Impact Today and Beyond (Part 1)

Leading in today's health care world requires an energy that focuses on creative engagement and inspiring collaboration within an organization. Being a director of nursing in today's health care environment can be challenging yet extremely rewarding! This engaging and interactive two-part session will guide clinical leader attendees through foundational and new leadership perspectives while providing tools that will help guide them for the future.

Learner Objectives:

- Analyze the challenges and opportunities facing post-acute care clinical leaders.
- Define key leadership principles that will set a solid foundation for clinical leaders today and beyond.
- List resources available to clinical leaders in post-acute care aligning with the key needs and demands of the director of nursing role.

Learner Level: Intermediate

Presenter: Lisa Thomson, Chief Operating Officer, Pathway Health, Lake Elmo, MN

Friday, May 5 - 8:15 a.m. to 9:45 a.m. (continued)



E28

Harnessing Your Data to Establish Value-Based Rates

This Baker Tilly session will focus on establishing rates for the residents you serve and should be paid by external payers. We will explore how to evaluate and determine your value through a fact-based process based on evaluations of your internal data as well as external data (competitive market data) to set rates that reflect the true value you provide the residents you serve.



Learner Objectives:

- List the internal and external data you should evaluate to establish the rates you should be charging for services.
- Outline the process of evaluating your internal data to establish the true value provided to your residents.
- Discuss practices to negotiate rates with external payers.

Learner Level: Advanced

Presenters: Michelle Reay, Baker Tilly, Senior Manager, Healthcare Consulting, Baker Tilly, New York, NY; Michael Edwin, Director, Senior Living, Baker Tilly, Madison, WI

E29

The Basics of Emergency Management in Assisted Living

Join us for this session to learn why an emergency plan is required in all levels, how to write the plan, and what other items are needed to have an emergency management program. The presenter will incorporate information from Occupational Safety and Health Emergency Management in Long-Term Care and will use the Hazardous Vulnerability Assessment (HVA) to show attendees how to decide for what emergencies to plan.

Learner Objectives:

- Discuss why an emergency plan is needed.
- Outline how to write an emergency plan.
- Demonstrate how to use the HVA tool.

Learner Level: Basic

Presenter: Ann Coyle, Nurse Manager, Emergency Management Coordinator, Gardenview Assisted Living, Menasha, WI



E30

Engaging Legacy Givers: Hope Is Not a Strategy. Using Data Is.

As the wealthiest generation in American history ages and migrates to senior living communities, organizations should seize the opportunity to connect with faithful donors who already have shown the capacity to give and the affinity with our campuses. The question is not: "Will generational wealth transfer happen?" The question is: "What is your organization doing to capture some of it?"



Learner Objectives:

- Discuss data-informed planned-giving donor prospecting and segmentation.
- Differentiate yourself from other charities and engage your donor with a compelling marketing message.
- Develop a simple and focused strategy to promote and close four types of planned gifts.

Learner Level: Intermediate

Presenters: Sarah Malchow, Chief Administrative Officer, Cedar Community, West Bend, WI; Nicole Pretre, Chief Executive Officer, Cedar Community, West Bend, WI

Friday, May 5 - 10:00 a.m. to 11:30 a.m.



F31

Should I Stay or Should I Go: What to Do with My SNF?

There's no doubt about it – nursing homes are still struggling out of Covid, and many organizations are starting to wonder out loud if they should stay in the business or perhaps change course. It's not an easy decision.

Learner Objectives:

- Analyze industry macro-trends challenging skilled nursing facility operators and the looming future state.
- Summarize the pros and cons associated with downsizing, repositioning, or exiting skilled nursing facilities.
- Outline steps to evaluate and deploy a change in skilled nursing facility business.

Learner Level: Intermediate

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



F32

The Wellbeing Advantage: Secrets to a More Productive Workforce

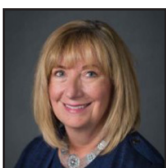
Paychex research revealed that more than 40 percent of the employees surveyed have experienced some combination of mental health, performance, and stress issues. Reported problems included depression, lack of motivation, reduced focus, insomnia, and decreased teamwork. Poor wellbeing in the workplace is a problem and businesses need to understand the different strategies they can adopt to help their employees and overall business performance. Healthy employees create healthy business and communities.

Learner Objectives:

- Analyze the cost of the current state of employee mental health and wellness in the workplace.
- Discuss the business impact of mental health and workplace challenges.
- List health initiatives employers are taking to improve employee workplace mental health.

Learner Level: Intermediate

Presenters: Carrie Kamm, Human Resource Services Area Manager, Paychex, Rochester, NY; Britt Riese, SHRM Certified Human Resource Professional, Paychex, Rochester, NY



F33

Clinical Leadership for the Greater Good: Making a Lasting Impact Today and Beyond (Part 2)

Leadership today requires a contagious positive energy that will enhance employee engagement, reduce turnover, and help change the direction of your team and organization! Part 2 of this session will provide participants with key strategies to form building blocks of a cohesive team, appreciating knowledge, skills and abilities of others while focusing on the greater good – personally and professionally!

Learner Objectives:

- Discuss the importance of positive relational energy in leadership today.
- List three key concepts for leading in today's health care world.
- Outline a plan to develop a cohesive team that values each other's strengths and assist to improve professional development.

Learner Level: Intermediate

Presenter: Lisa Thomson, Chief Operating Officer, Pathway Health, Lake Elmo, MN

Friday, May 5 - 10:00 a.m. to 11:30 a.m. (continued)



F34

Formulating Strategic Decisions from Market Data

This session on conducting market studies will be more than just a how-to. First, Baker Tilly will discuss key steps in conducting a market study. Then, the presenters will take it to the next step and discuss how you interpret the data to make decisions and incorporate them in your long-range strategic planning and how you will make better strategic decisions by using market data.

Learner Objectives:

- Analyze the nuts and bolts of conducting a market study.
- Discuss the value of a market study beyond simple data collection and analysis.
- Demonstrate your understanding of how market studies lead to better strategic decisions and help establish your value as you set rates and service fees.

Learner Level: Advanced

Presenters: Michelle Reay, Baker Tilly, Senior Manager, Health care Consulting, Baker Tilly, New York, NY; Michael Edwin, Director, Senior Living, Baker Tilly, Madison, WI

F35

How to Carry Out an Emergency Management Program

Participants will learn about individual emergency management policies such as cold weather, missing resident, and active shooter. Participants also will learn how to do the required emergency drills, how to choose what kind of drill to do, and the realities of record keeping. Using the Oakridge fire as an example, the presenter will discuss incident command policies and job descriptions.

Learner Objectives:

- Develop a plan for conducting the required emergency drills.
- Outline the record keeping requirements for your emergency management program.
- Outline basic incident command procedures.

Learner Level: Basic

Presenter: Ann Coyle, Nurse Manager, Emergency Management Coordinator, Gardenview Assisted Living, Menasha, WI



F36

Relationship-Based Fundraising 101: The Art and Science

In a crowded field of not-for-profit organizations and causes, donors are becoming more sophisticated and selective than ever before. The importance of establishing strong (and long-term) relationships, strategies, and messaging will help you stand out from the crowd. Intentionally cultivating the next gift and measuring your impact as part of your resource development plan is vital.

Learner Objectives:

- Discuss the critical importance of investing in donor-centric and relationship-based development.
- List industry best-practices in gift prospecting, cultivation, closing, and stewardship.
- Develop a simple strategy to engage, cultivate, and steward donors and measure impact.

Learner Level: Intermediate

Presenters: Sarah Malchow, Chief Administrative Officer, Cedar Community, West Bend, WI; Nicole Pretre, Chief Executive Officer, Cedar Community, West Bend, WI

VALUE1st

Choices ■ Solutions ■ Savings

www.value1stonline.com

5-Star Dining Program



Hospitality for the Best in Senior Living



For more information contact Denise May
dmay@leadingagewi.org • 608.609.6964

