

2023 Fall Conference & 43rd Annual Exhibitors Forum
Growing Beyond Our Boundaries



LeadingAge[™]
Wisconsin

October 4-6, 2023
KI Convention
Center Green Bay
Wisconsin



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Growing Beyond Our Boundaries

October 4-6, 2023
KI Convention Center
333 Main Street
Green Bay, Wisconsin 54301

Go where you've never gone before. Become who you never knew you could be.

Our customers have changed. We have changed. Our world has changed. With massive change comes unprecedented opportunities – opportunities to provide services in new ways, to form new partnerships, to communicate with new population groups, to incorporate new technologies, to reach new heights, to become the providers of service in a new age of health care. Join us for the 2023 Fall Conference & 43rd Annual Exhibitors Forum where we will explore new trends and analyze new perspectives of the regulatory, clinical, financial, operational, and social aspects of care delivery. Join us for this educational event as we continue *Growing Beyond Our Boundaries* to become the future we want to see.

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

Registration & Fees

Help shape our future. Register today:
<https://cvent.me/9DB17V>

LeadingAge Wisconsin Members:

Oct. 4 - Pre-conference \$ 35 per person
Oct. 5-6 - Conference \$295 per person
Oct. 5 only - Conference \$210 per person
Oct. 6 only - Conference \$125 per person

Non-Members:

Oct. 4 - Pre-conference \$ 70 per person
Oct. 5-6 - Conference \$345 per person
Oct. 5 only - Conference \$260 per person
Oct. 6 only - Conference \$175 per person

The above registration fees reflect the early bird discount. If you complete your registration after September 13, 2023, you will be charged the regular registration fees -- an increase of \$20 per person for the pre-conference and an increase of \$50 per person for the conference.

The registration fee for the pre-conference workshops on October 4th is not included in the conference registration fee.

The conference registration fee includes the educational sessions, admission to the 43rd Annual Exhibitors Forum, the Welcoming Reception, access to the conference app, name badges, break refreshments, and meals listed in this program booklet.

Overnight Accommodations

Please direct all room reservation requests and related questions to the hotel of your choice. Remember to indicate you are attending the conference of LeadingAge Wisconsin and you wish a room within the LeadingAge Wisconsin block. Overnight accommodations are available on a first-come-first-served basis at each of the hotels.

Hampton Inn

(Connected to the Convention Center)
 201 Main Street, Green Bay, WI 54301
 920-437-5900

[Book your room](#)

Room block expires on 09/03/2023
 Room rates begin at \$154

Hyatt Regency

(Connected to the Convention Center)
 333 Main Street
 Green Bay, WI 54031

[Book your room](#)

Room block expires on 09/01/2023
 Room rates begin at \$115

Hotel Northland

(less than one-half mile to the Convention Center)
 304 North Adams Street
 Green Bay, WI 54301
 920-393-7499

[Book your room](#)

Room block expires on 09/03/2023
 Room rates begin at \$149

Hawthorn Suites by Wyndham

(5 minutes from the Convention Center)
 335 W. St. Joseph Street
 Green Bay, WI 54301
 920-435-2222

Room block expires on 09/04/2023
 Room rates begin at \$99

Quality Inn and Suites

(6 minutes from the Convention Center)
 331 South Washington Street
 Green Bay, WI 54301
 920-437-8771

[Book your room](#)

Room block expires on 09/19/2023
 Room rates begin at \$79

Tundra Lodge

(9 minutes from the Convention Center)
 865 Lombardi Avenue
 Green Bay, WI 54304
 877-886-3725

Room block expires on 09/08/2023
 Room rates begin at \$99.95

Online Registration

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

To qualify for the early registration discount, you must complete and submit your registration by September 13, 2023.



Click Here for a Conference Summary:
<https://cvent.me/9DB17V>

Cancellation Policy

Any cancellation prior to September 26, 2023 will receive a 100% refund. After September 26th if you need to cancel your registration due to survey, illness, or death in your immediate family, please contact LeadingAge Wisconsin to discuss refund options. If you have a concern with any aspect of this educational offering, please contact the LeadingAge Wisconsin office.

For Additional Information Contact:

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

LeadingAge™
Wisconsin

Schedule at a Glance

Wednesday, October 4, 2023

- 8:00 a.m. to 4:30 p.m. **Registration Open**
- 9:00 a.m. to 11:30 a.m. **LeadingChoice Network Annual Meeting** (*LeadingChoice Network members only*)
- 10:15 a.m. to 11:30 a.m. **Networking Meetings**
There will be meetings for: Assisted Living Professionals, Clinical Professionals, Finance Professionals, Human Resource Professionals, Marketing Professionals, Social Service Professionals, and Senior Housing/Independent Living 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 6-9)
PC1 - Leading the Charge to Grow Beyond Our Boundaries (Sponsored by D.A. Davidson)
PC2 - Growing Beyond Our Boundaries: Excellence in Daily Practice
(Sponsored by Value First)
PC3 - Leading through Difficult Times (Sponsored by Marsh McLennan Agency)
PC4 - Dreaming of Retirement? Action Steps for the Employee and Employer
PC5 - Capturing the Passion: Creating Impactful Photography for Social Media and Beyond
- 4:45 p.m. to 7:00 p.m. **Welcoming Reception** (Details on page 11) (Sponsored by M3 Insurance and Value First)

Thursday, October 5, 2023

- 7:00 a.m. to 4:30 p.m. **Registration Open**
- 7:00 a.m. to 8:00 a.m. **Breakfast Buffet**
- 8:00 a.m. to 9:30 a.m. **Conference Opening & Keynote Address** (Details on page 12)
Who Are You BECOMING? (Sponsored by Ziegler)
- 9:30 a.m. to 9:45 a.m. **Break** (Sponsored by Wisconsin Health & Education Facilities Authority - WHEFA)
- 9:45 a.m. to 10:45 a.m. **Six Simultaneous Breakout Sessions** (Details on pages 13-17)
A01 - The Servant Leader Paradox: 4 Secrets of Leaders We CHOOSE to Follow and Cultures We CHOOSE to Join!
A02 - Is Your Skilled Nursing Facility Survey Ready?
A03 - Bold Decisions to Position for Future Success
A04 - How to Provide Feedback without Criticism
A05 - Growing Beyond Our Boundaries: Regulatory Compliance-Investigations
A06 - Changing the Culture of Dementia Care
- 10:45 a.m. to 11:00 a.m. **Break** (Sponsored by Select Rehabilitation)
- 11:00 a.m. to 12:00 p.m. **Six Simultaneous Breakout Sessions** (Details on pages 18-20)
B07 - Challenging Our Traditional Boundaries
B08 - Facility Reported Incidents: What You Need to Know
B09 - A Legal Perspective of a Financial Issue
B10 - Growing Emotional Intelligence
B11 - Growing Beyond Our Boundaries: Regulatory Compliance – Survey Prep
B12 - Cyber Incidents: When Your Data Goes Beyond Your Boundaries

- 12:00 p.m. to 2:00 p.m. **Lunch at the 43rd Annual Exhibitors Forum** (Details on page 21)
- 2:00 p.m. to 3:00 p.m. **Six Simultaneous Breakout Sessions** (Details on pages 22-25)
C13 - Growing Beyond Our Boundaries with Better Managed Care (Part 1)
C14 - Learning from an Infection that Grew Beyond Our Boundaries
C15 - When LTC Insurance Questions Come within Our Boundaries
C16 - Recognizing and Dealing with Toxic Behavior
C17 - Growing Our Legal Finesse in Assisted Living
C18 - Cost Control Clue
- 3:00 p.m. to 3:15 p.m. **Break** (Sponsored by HealthDirect Pharmacy)
- 3:15 p.m. to 4:15 p.m. **Six Simultaneous Breakout Sessions** (Details on pages 26-28)
D19 - Growing Beyond Our Boundaries with Better Managed Care (Part 2)
D20 - Reaching the Next Level of Infection Prevention and Control Practices
D21 - Medicare & Medicaid: Dot Your I's and Cross Your T's
D22 - What to Do When You Don't Want to Have a Talk
D23 - Growing Beyond Our Boundaries: Developing a Stellar ISP
D24 - Life Safety for Long-Term Care and Beyond
- 4:15 p.m. to 7:00 p.m. **Evening Event at the 43rd Annual Exhibitors Forum** (Details on pages 30-31)
(Sponsored by CLA; Compeer Financial; Hoffman Planning, Design & Construction; Lincare; and Martin Bros.)
- 6:30 p.m. to 7:00 p.m. **Exhibitor Door Prize Drawings**
- 7:00 p.m. **Sponsored Evening Events** (Details on page 30)

Friday, October 6, 2023

- 7:00 a.m. to 10:45 a.m. **Registration Open**
- 7:00 a.m. to 8:30 a.m. **Breakfast Buffet**
- 8:30 a.m. to 9:30 a.m. **Six Simultaneous Breakout Sessions** (Details on pages 32-34)
E25 - Strategic Planning for Aging Services: Road Map for Managing Your Own Approach
(Part 1) (Sponsored by Johnson Financial Group)
E26 - Surveyors and Providers: Growing as a Team
E27 - Measuring Employee Commitment to Enhance Retention
E28 - Building A Magnetic Employee Value Proposition
E29 - WOW!! Did I REALLY See That?
INTERACTIVE Infection Prevention and Control for Assisted Living (Part 1)
E30 - Push Your Census Boundaries with Persona Branding (Part 1)
- 9:30 a.m. to 9:45 a.m. **Break** (Sponsored by Compeer Financial)
- 9:45 a.m. to 10:45 a.m. **Six Simultaneous Breakout Sessions** (Details on pages 35-36)
F31 - Strategic Planning for Aging Services: Road Map for Managing Your Own Approach
(Part 2) (Sponsored by Johnson Financial Group)
F32 - For an Organization to Grow Beyond their Boundaries –
They Must First Start With a Success-Driven, Innovative Nursing Culture from Within
F33 - Exempt or Non-Exempt: That Is the Question
F34 - Staff Scheduling: Flexibility Is the Name of the Game
F35 - WOW!! Did I REALLY See That?
INTERACTIVE Infection Prevention and Control for Assisted Living (Part 2)
F36 - Push Your Census Boundaries with Channel Marketing Techniques (Part 2)

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



PC1

Leading the Charge to Grow Beyond Our Boundaries



It's a new world for LeadingAge Wisconsin as well as for our members and subscribers. Our new President/CEO is bringing to the association a new skill set and new perspectives to help us shape our future. Members and subscribers are emerging from the pandemic facing an onslaught of new realities and a burgeoning impact from developing trends. Join us at a 30,000-foot level for this extension of our CEO Network as we explore how we can grow beyond our boundaries to shape the new world of senior services and supports in Wisconsin. What is our vision for the future? How will we bring this vision to life? What do you need from LeadingAge Wisconsin to help drive your organization's continued success? Join us for this interactive think tank that will play a significant role in the upcoming LeadingAge Wisconsin strategic planning discussions.

Learner Objectives:

- Identify methods for ramping up member CEO engagement, networking, and sharing.
- List three trends already impacting the future of your organization.
- Discuss what successful CEOs are thinking and doing now to position their organizations for future success.
- Rank current and potential new services that member/subscriber providers will need most to navigate changing realities as we move forward.

Learner Level: Advanced

Facilitators: Tim Conroy, LeadingAge Wisconsin Board Chair, Executive Director, Capitol Lakes, Madison, WI; Jim Orheim, President & CEO, LeadingAge Wisconsin, Madison, WI

Diamond Sponsor

Pre-conference Workshop PC1

Leading the Charge to Grow Beyond Our Boundaries

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

(with a 15-minute break)



PC2

Growing Beyond Our Boundaries: Excellence in Daily Practice

In this interactive session for RCAC and CBRF providers, we will continue to expand on the concepts introduced in previous sessions. We will focus on the value of team building and practice a variety of effective team building techniques. We will continue to expand the Assisted Living Evaluation Tool and explore how the Evaluation Tool impacts admission/retention/discharge criteria. We will break into groups and delve into admission scenarios. We will follow the admission process from the initial referral to the decision to accept or decline the admission. We will learn the components of the admission process, and how to facilitate effective resident and family onboarding.



Learner Objectives:

- Develop a plan to build team building skills and demonstrate proficiency in facilitating team building activities.
- Refine the components of the Assisted Living Evaluation Tool for your organization.
- Explore how the Assisted Living Evaluation Tool is the basis for quality care delivery.
- Outline an efficient process for evaluating and managing the admission process.
- Identify the components for effective onboarding processes for residents and families.



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

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Pre-conference Workshop PC2

Growing Beyond Our Boundaries: Excellence in Daily Practice

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Madison, WI 53703

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Value First is a group purchasing organization owned by LeadingAge and twenty-five of its state affiliates. As a LeadingAge member benefit, Value First is focused on the needs of senior living communities by providing choices, solutions and savings on food, medical, environmental and office supplies including capital equipment.

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

(with a 15-minute break)



PC3

Leading through Difficult Times

In *Leading through Difficult Times*, you will have an opportunity to learn, discuss, and reflect on how important a leader's behavior is during difficult times, the impact it has, and how to lead both yourself and others through challenging times. This workshop will give you tools, models, and concepts to help you lead more effectively in difficult times.

Learner Objectives:

- Discuss the impact of leadership behavior during difficult times.
- Develop a plan for leading yourself through difficult times.
- Outline a process for leading others through difficult times.

Learner Level: Intermediate

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

Diamond Sponsor
Pre-conference Workshop PC3
Leading through Difficult Times

Sponsored By



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

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

(with a 15-minute break)



PC4

Dreaming of Retirement? Action Steps for the Employee and Employer

Part 1: Learn How to Plan the Future You Want! -- Whatever your stage in life or current financial circumstance, now is the time to start planning. The first half of this workshop will focus on how to examine your financial purpose and will offer you practical guidance to ensure short- and long-term goals, economic resources, and behaviors are aligned to facilitate the retirement future you dream of!



Part 2: Beyond Traditional Boundaries of Retirement Plan Design and Communication -- Given that building a thriving workplace has never been more critical, the panel discussion in the second half of this workshop will look at retirement plan design and the critical role plans have in attracting and retaining employees. This session also will explore how employers can harness resources to meet employees where they are and better prepare them to take action toward a financially successful future.



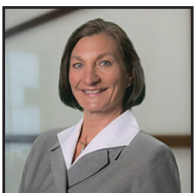
Learner Objectives:

- Identify the power of a financial plan and outline how to start that process.
- Discuss income replacement in retirement giving consideration to Secure Act 2.0, Social Security optimization, healthcare/Medicare considerations, and taxation highlights.
- Discuss why estate planning, once thought to be just for the rich and famous, now is a vehicle for your purpose and story.
- Outline optimal retirement plan design considering trends and opportunities.
- Analyze how Secure Act 2.0 impacts the retirement plan program.
- Develop a plan for integrating financial wellness into your communication strategy.



Learner Level: Intermediate

Presenters from Johnson Financial: Kelly Mould, JD, CTFA, CWS®, CDFA®, Senior Vice President, Director of Wealth Business Development, Racine, WI; Melissa Olson, Officer Wealth, Retirement Plan Services Education Specialist, Milwaukee, WI; David Wyatt, CFP®, Vice President Wealth and Retirement Plan Services Advisor, Milwaukee, WI; Joe Maier JD, CPA, Senior Vice President Wealth Strategy, Milwaukee, WI; Steve Backus, Senior Vice President Institutional Service Advisor, Milwaukee, WI; Breton B. Almstedt, CEBS RPA | Vice President / Service Manager, Wealth Retirement Plan Services; Pamela W. Schneider, CPA, JD, LL.M, CMA, Non-Lawyer Professional, vonBriesen & Roper, s.c., Green Bay & Neenah, Wisconsin



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

(with a 15-minute break)



PC5

Capturing the Passion: Creating Impactful Photography for Social Media and Beyond

If a picture tells a story, what do the photos you use on your website and social media say about your community? Join Heidi Wagner, photographer and creator of The Passions Project, to learn how to create engaging and unique photos that tell a new story of your community.

Learner Objectives:

- Identify the three basic settings on your camera and how/when to best use each.
- Discuss how to use light to create interesting images.
- Analyze composition and framing of fun photos.

Learner Level: Intermediate

Advance Preparation Needed: Bring your smart phone or a company camera to take event photos.

Presenter: Heidi Wagner, Photographer and Creator of The Passions Project, Boulder, CO

What to Wear

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

The KI Convention Center does its best to provide a comfortable climate for our conference; however, everyone responds differently to climate-controlled environments, and sometimes it is warmer or cooler than you prefer. We hope you will take this into consideration when preparing for this conference and wear clothing that can be layered.

Online Registration



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

To qualify for the early registration discount, you must complete and submit your registration by September 13, 2023.



Click Here for a Conference Summary:
<https://cvent.me/9DB17V>

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 September 13, 2023) for any of the pre-conference workshops.

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

Diamond Sponsor
Welcoming Reception Beverages

Wednesday, October 4, 2023 -- 4:45 p.m. to 7:00 p.m.

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Welcoming Reception Appetizers

Wednesday, October 4, 2023 -- 4:45 p.m. to 7:00 p.m.

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Value First
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Thursday, October 5 - 8:00 a.m. to 9:30 a.m.



Conference Opening & Keynote Address

Who Are You BECOMING?

A year from today, will you be a better leader... or not? The answer affects every aspect of our lives. Based on Jonathan's best-selling book, *Who are you BECOMING?*, this keynote introduces four game-changing pillars and a simple blueprint for enhancing these pillars in your own life and organization.

Learner Objectives:

- Develop the *Who are you BECOMING?* Blueprint for you and your team.
- Identify the greatest leadership advice ever given to a U.S. president -- advice that has been given to every U.S. president for 40 years.
- Outline a success formula mastered by world-class 7th grade teachers and Auschwitz survivor, Viktor Frankl.
- Explore Walt Disney's "Friday Routine" for creating, communicating, coaching, and living in passionate pursuit.

Learner Level: Basic

Presenter: Jonathan Fanning, President, Who are you BECOMING? Institute, Poestenkill, NY

Diamond Sponsor

Keynote Address Featuring Jonathan Fanning
Thursday, October 5, 2023 -- 8:00 a.m. to 9:30 a.m.

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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 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, October 5 - 9:45 a.m. to 10:45 a.m.



A01

The Servant Leader Paradox:

4 Secrets of Leaders We CHOOSE to Follow and Cultures We CHOOSE to Join!

What four things separate servant leaders? Most organizations fall short on at least two of these building blocks. This unique exploration of the most effective time-tested leadership paradoxes may change the way you look at leadership, culture, and role models forever.

Learner Objectives:

- Aspiring servant leaders get stuck on the boundary between two words: Discuss how you will discover and challenge that boundary.
- Discuss how leaders can demonstrate, teach, and inspire others who pay a personal price in our short-term, “what’s in it for me?” culture.
- Identify the single – rarely discussed – choice made by the most highly engaging leaders and cultures.

Learner Level: Intermediate

Presenter: Jonathan Fanning, President, Who are you BECOMING? Institute, Poestenkill, NY



A02

Is Your Skilled Nursing Facility Survey Ready?

This session will be a walk through of the new welcome packet put together by the Bureau of Nursing Home Resident Care. You will learn what skilled nursing facilities most need to know right now to be survey ready, including how to prep your staff, how to prep your residents, what should be in your binder, and more.



Learner Objectives:

- Discuss the contents of the new welcome packet put together by the Bureau of Nursing Home Resident Care.
- Identify specific practices that you can put into place now to ensure your skilled nursing facility is always survey ready.
- List what’s missing from your survey binder and develop a plan to update the binder according to your findings.

Learner Level: Intermediate

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

Thursday October 5 - 9:45 a.m. to 10:45 a.m. (continued)



A03

Bold Decisions to Position for Future Success

Repositioning a nursing home to an assisted living is possible! Attic Angel took this bold step in 2017. Learn what data and analyses are necessary to make the transition. Walk through a step-by-step guide of the process and discuss financial implications, costs, and impact on revenue for your organization.

Learner Objectives:

- Discuss the appropriate way to approach consideration of repositioning your skilled nursing facility to assisted living.
- Analyze the impact of repositioning beyond the numbers.
- Discuss the concept of positioning for success beyond the initial change.

Learner Level: Advanced

Presenter: Michelle Godfrey, President & CEO, Attic Angel Community, Madison, WI

Diamond Sponsor Refreshment Break

Thursday, October 5, 2023
9:30 a.m. to 9:45 a.m.

Sponsored By



Wisconsin Health & Educational Facilities Authority
18000 West 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.

Conference Sponsor Refreshment Break

Thursday, October 5, 2023
10:45 a.m. to 11:00 a.m.

Sponsored By



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

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

Thursday, October 5 - 9:45 a.m. to 10:45 a.m. (continued)



A04

How to Provide Feedback without Criticism

This session focuses on helping leaders to deliver constructive, disarming feedback with empathy and tact, with an eye to building stronger, more collaborative teams. Discover the power of positive language to fostering a growth-oriented environment, enabling you to inspire and uplift others while promoting personal and professional development.

Learner Objectives:

- List practical techniques for delivering feedback with empathy in a constructive and non-critical manner.
- Explore the impact of positive language and relational listening in promoting a growth-oriented feedback culture.
- Develop confidence in providing feedback that inspires and uplifts individuals, fostering a supportive learning and working environment.

Learner Level: Intermediate

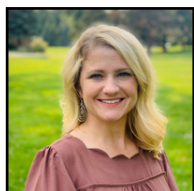
Presenter: Yvette Erasmus, MEd, PsyD, LP, Consulting Psychologist, Yvette Erasmus LLC, Minneapolis, MN



A05

Growing Beyond Our Boundaries: Regulatory Compliance-Investigations

This session will focus on regulatory compliance as it relates to investigations, notifications, and reporting requirements. Participants will learn the difference in requirements for RCAC and CBRF providers. We will review the regulations related to investigations and reporting, including when to involve law enforcement and outside agencies. We will review DHS 83, DHS 89, and Ch 55.043 as they relate to reporting requirements. We will review the Reporting Requirements for Assisted Living Facilities document from DHS. We will explore the components of an effective investigation. We will discuss how to make the decision to do a self-report and what that looks like. We also will break into groups and practice scenarios related to various types of investigations and reports.



Learner Objectives:

- Explore various aspects of regulatory compliance, including investigation, notification, and reporting requirements
- Cite relevant regulations related to investigations and reporting per DHS 83, DHS 89, and Ch 55.043(adults at risk).
- Outline the components of a thorough investigation.
- Discuss when to involve law enforcement and outside agencies in an investigation.
- Develop a process for effectively managing self-reports.

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

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Thursday, October 5 - 9:45 a.m. to 10:45 a.m. (continued)



A06

Changing the Culture of Dementia Care

It can take two years to shift the culture of an organization. Let's keep the momentum going by ensuring staff continue to grow the dementia care skills they need to be successful in their work. This interactive workshop explores the three foundational skills professionals should master to improve the quality of life for people living with dementia.

Learner Objectives:

- Analyze the correlation between staff retention and skill development.
- Discuss how consideration of employees' individual learning styles can positively affect skill development.
- Examine the impact of mastering these foundational skills: (1) Interpreting how people living with dementia communicate unmet needs (2) How we physically approach people living with dementia, and (3) How we verbally communicate with people living with dementia.

Learner Level: Intermediate

Presenter: Sheri Fairman, Certified Trainer, Consultant, Coach, and Champion Teacher, Owner, Dementia Care Solutions, Green Bay, WI

Continuing Education

LeadingAge Wisconsin has requested this educational program, including the pre-conference workshops and the conference sessions, be approved for up to ten (10.0) 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.



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We're proud to support the LeadingAge Wisconsin 2023 Fall Conference in its effort to enrich our communities.

By connecting providers and stakeholders, we can address the challenges, and celebrate the rewards, of providing care to Wisconsin's aging population.

Thursday, October 5 - 11:00 a.m. to 12:00 p.m.



B07

Challenging Our Traditional Boundaries

As the old adage goes, the only thing that is certain is uncertainty (as well as death and taxes...but we are not discussing those here!). Many organizations are trapped in the “we have always done it this way before” loop and are unable to navigate their way to a new path. One of the keys to long-term viability in the senior living sector is adaptability, defined as the ability to adjust to new conditions. This can be proactive (actions taken to make your organization strategically nimble) as well as reactive (adjustments made to address changing market dynamics). In this engaging and informal panel discussion, hear how several C-suite professionals representing multiple organizations in terms of size, scale and services have adapted to achieve strategic growth and success.



Learner Objectives:

- Discuss how successful senior living C-suite professionals think and act differently than the CEOs of struggling organizations.
- Outline how these professionals developed and/or changed their strategic plans and positioned their organizations to successfully execute these plans.
- Using information shared in this session, outline thought processes and actions that you will change to better position your organization for future success.

Learner Level: Advanced

Presenters: Romy McCarthy, Managing Director, D.A. Davidson, Milwaukee, WI; E. DeAnn Eaton, Chief Executive Officer, Haverland Carter Lifestyle Group, Albuquerque, NM; Mark Pietrowiak, Vice President of Business Development, Illuminous, Wateertown, WI



B08

Facility Reported Incidents: What You Need to Know

This session will cover changes in reporting facility reported incidents, including the importance of reporting facility reported incident (FRI), what constitutes a FRI, new reporting time frames and the importance of the initial report and 5-day report.

Learner Objectives:

- Define reportable events.
- Outline reporting time frames.
- List information that must be included in the initial report.

Learner Level: Basic

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

Thursday, October 5 - 11:00 a.m. to 12:00 p.m. (continued)



B09

A Legal Perspective of a Financial Issue

Geared for finance professionals in long-term care, this session will look at admission agreements and contracts with a special focus on how providers legally can get information on the average number of years a person's money might last, income, and asset thresholds. From there, the session will move into other legal issues that long-term care finance professionals should keep in mind.



Learner Objectives:

- Identify appropriate and legal ways to obtain a potential resident's income and assets on an admission agreement or contract.
- Discuss financial information that should not be asked on an admission agreement or contract.
- List other legal issues of which all long-term care legal professionals should be aware.

Learner Level: Intermediate

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



B10

Growing Emotional Intelligence

Emotions affect everything – and they're contagious, especially in our boundaryless, text-crazy, virtual, on-demand culture. This program is full of incredibly memorable stories, real-life scenarios, and practical tools to take your emotional intelligence (EI) to the next level.

Learner Objectives:

- Discuss the EI Grid and list two questions for navigating emotions.
- Outline the "recipes" and "unwritten agreements" that carry a massive emotional weight in relationships and cultures.
- Demonstrate appropriate use of the TFAR loop to find your best go-to strategies for affecting emotions.

Learner Level: Basic

Presenter: Jonathan Fanning, President, Who are you BECOMING? Institute, Poestenkill, NY

Thursday, October 5 - 11:00 a.m. to 12:00 p.m. (continued)



B11

Growing Beyond Our Boundaries: Regulatory Compliance – Survey Prep

In this session, RCAC and CBRF providers will discuss how to integrate survey prep into daily practice. We will discuss how the Assisted Living Evaluation Tool is the basis for educational opportunities. We will learn how to implement a practice of continuous auditing to ensure competence and quality of care. We will develop examples of audit topics and schedules. We will focus briefly on the HCBS requirements and how to interact effectively with Family Care organizations.



Learner Objectives:

- List key components to be aware of related to survey preparation.
- Discuss how to identify educational opportunities and provide appropriate training and guidance.
- Explore how to set up a successful program for audits and competency checks, including the benefits of involving staff in the overall process.
- Identify the components of heightened scrutiny and Family Care contracts.



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



B12

Cyber Incidents: When Your Data Goes Beyond Your Boundaries

A cyber-attack. A security incident. All your information and data held ransom. Yes, it can happen to you! Join this session to hear the bitter truth about the realities when a security incident does happen. Learn what you can and should do now to be proactive in protecting your organization's information and data.



Learner Objectives:

- Outline different ways a security incident could happen in your organization.
- Define the potential harm of a cyber-attack.
- Identify steps to take to minimize your risk of a security incident.

Learner Level: Intermediate

Presenters: Stephanie Chedid, President & CEO, Luther Manor, Wauwatosa, WI; Matt Thomson, Director of Cyber Liability, M3 Insurance, Green Bay, WI

Thursday, October 5 - 12:00 p.m. to 2:00 p.m.

Lunch at the 43rd Annual Exhibitors Forum

Every day, you encounter great challenges, wonderful opportunities, exciting trends, and unprecedented innovations in your journey forward. To maximize your ability to serve your residents and tenants, it is important to have allies nearby and resources ready to equip you with the information, tools, and products you will need to fulfill your mission. Welcome to our 43rd Annual Exhibitors Forum, a showcase of products and services designed to enhance the quality of care and services you provide. We have some exciting new features incorporated into this year’s show. Join us to explore, learn, and network. Talk with our vendors. Meet our sponsors. Grab some lunch.

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Thursday, October 5 - 2:00 p.m. to 3:00 p.m.



C13

Growing Beyond Our Boundaries with Better Managed Care (Part 1)

They are back! And this time with DHS, as you requested after our Spring Conference. Join this interactive discussion as our panel explores likely scenarios for managing care as 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, managed care organizations, and DHS. The MCOs will discuss difficulties that hamper care coordination and solutions for overcoming these difficulties. DHS will focus on what is working, what is not, and how we move forward together better positioned to serve the interests and needs of individuals who need care and support. (Discussion will continue in Session D19)



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, DHS, and the MCOs.

Learner Level: Intermediate

Facilitator: Karen Sepich, Vice President of Community Services, Bethany St. Joseph Corporation, La Crosse, WI

Panelists: Jamie Kuhn, State Medicaid Director, Wisconsin Department of Health Services, Madison, WI; Maria Ledger, CEO, My Choice Wisconsin, Wauwatosa, WI; Tony Mollica, President/CEO, iCare, Milwaukee, WI; Sara Muhlbauer, CEO, Lakeland Care, Oshkosh, WI; Kenneth Munson, CEO, Community Care, Inc., Brookfield, WI

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Thursday, October 5 - 2:00 p.m. to 3:00 p.m. (continued)



C14

Learning from an Infection that Grew Beyond Our Boundaries

A pandemic has a way of changing our view on infection control! We have changed, we have learned, and we have grown, especially in terms of our views on the value of infection control. This session will focus on what is trending in infection control (including the mechanisms of infection control) in long-term care and assisted living communities.

Learner Objectives:

- Discuss what we know and understand better about infection control because of the pandemic.
- Outline current infection control trends that will impact long-term care and assisted living providers.
- Identify current mechanisms of infection control.
- Explore infection control issues which still are largely misunderstood.

Learner Level: Intermediate

Presenter: Christopher J. Crnich, MD, PhD, Chief of Medicine, Madison VA Hospital, Associate Professor of Medicine, Division of Infectious Diseases, University of Wisconsin School of Medicine and Public Health, Madison, WI



C15

When LTC Insurance Questions Come within Our Boundaries

This session will provide guidance on how long-term care providers can best respond to the many questions they receive regarding long-term care insurance. What can long-term care (LTC) insurance do to help with the expense of long-term care? Is long-term care insurance worth it? What are the typical costs? What types of care does LTC insurance cover? How long will LTC insurance cover long-term care? How can individuals evaluate the differences between policies to fit their specific needs? How does LTC insurance impact the beneficiary's finances? When should a person consider purchasing LTC insurance? You get asked the questions; we have the answers. As a long-term care provider, you understand the basics, so this session will dig deeper providing considerations and perspectives which may not have been previously considered. You will leave with more understanding of LTC insurance questions and will have resources to assist.

Learner Objectives:

- Provide answers to the most frequently asked questions about long-term care insurance.
- For whom is long-term care insurance most appropriate?
- Discuss how long-term care insurance impacts a consumer's life, both financially and quality of life.

Learner Level: Intermediate

Presenter: Vicki Buchholz, Medigap Helpline Services Supervisor, Board on Aging and Long-Term Care, Madison, WI

Thursday, October 5 - 2:00 p.m. to 3:00 p.m. (continued)



C16

Recognizing and Dealing with Toxic Behavior

Join in discussing and sharing best practices in *Recognizing and Dealing with Toxic Behavior* in this breakout session. You will learn from others and reflect upon what actions you want to take moving forward. Discussion will be based on real examples shared by LeadingAge Wisconsin member organizations.

Learner Objectives:

- Provide examples of toxic behavior.
- List considerations when determining how to deal with toxic behavior.
- Discuss best practices to curtailing toxic behavior in your organization.

Learner Level: Intermediate

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



C17

Growing Our Legal Finesse in Assisted Living

Assisted living professionals juggle a wide variety of responsibilities covering a broad spectrum of issues. It's not always easy to know the right thing to do when a difficult decision has to be made in a short amount of time. This session will shed light on some of the legal issues impacting assisted living communities with a clear focus on delineating what pertains to RCACs and CBRFs. You will learn the legally appropriate way to write a 30-day notice, what your responsibilities are related to issuing a 30-day notice, transitioning residents to the next level of care, appropriate responses when family wishes collide with resident rights, and more.

Learner Objectives:

- Discuss three legal issues impacting today's assisted living providers and how these issues might impact CBRFs and RCACs differently.
- List what items must be included in a 30-day notice and note any difference there might be for RCACs compared to CBRFs.
- Outline the provider's responsibilities once a 30-day notice has been issued.

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, October 5 - 2:00 p.m. to 3:00 p.m. (continued)



C18

Cost Control Clue

Enjoy and learn from the theatrics as we get to the bottom of the disappearing money at XYZ Nursing Facility. Since food is one of the top expenses in a senior living community, our detective and cast will uncover who is responsible, where the incident happens, and what weapon is causing the monetary crime. We will discuss current industry costing benchmarks and inflationary trends and offer practical solutions to successfully achieve dining budgetary success.

Learner Objectives:

- Analyze current costing benchmarks and inflationary trends in senior living food service.
- List efficient opportunities to control food costs within your entire community.
- Outline cost effective strategies for food purchasing, cooking, storing, and reducing food waste.

Learner Level: Intermediate

Presenter: Julie Halfpop, Director of Nutrition and Dining Strategies, Martin Bros Distributing, Cedar Falls, IA

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Thursday, October 5 - 3:15 p.m. to 4:15 p.m.



D19

Growing Beyond Our Boundaries with Better Managed Care (Part 2)

Discussion will continue from Session C13

Learner Level: Intermediate

Facilitator: Karen Sepich, Vice President of Community Services, Bethany St. Joseph Corporation, La Crosse, WI

Panelists: Curtis J. Cunningham, Assistant Administrator for Benefits and Service Delivery, Division of Medicaid Services, Wisconsin Department of Health Services, Madison, WI; Maria Ledger (invited), CEO, My Choice Wisconsin, Wauwatosa, WI; Tony Mollica, President/CEO, iCare, Milwaukee, WI; Sara Muhlbauer, CEO, Lakeland Care, Oshkosh, WI; Kenneth Munson, CEO, Community Care, Inc., Brookfield, WI



D20

Reaching the Next Level of Infection Prevention and Control Practices

Now that you have learned about the trends and new mechanisms of infection prevention and control, what do you do about them? This will be an interactive, practical discussion of the tips, tools, strategies, and how-tos for effectively operationalizing the mechanisms and proactively addressing infection prevention and control trends in skilled nursing facilities.

Learner Objectives:

- Develop a plan for proactively addressing infection prevention and control trends that will impact skilled nursing facilities.
- Discuss the practical application of some new infection prevention and control mechanisms.
- Outline steps for operationalizing infection prevention and control in your skilled nursing facility so that the next pandemic will not catch you and your team off guard.

Learner Level: Intermediate

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

Thursday, October 5 - 3:15 p.m. to 4:15 p.m. (continued)



D21

Medicare & Medicaid: Dot Your I's and Cross Your T's

What's with all the appeals and denials for skilled nursing facilities by Medicare Advantage plans? Why is the U.S. Congress hearing testimony regarding Medicare Advantage plan denials and delays with a special focus on skilled nursing facility denials? What's prompting all the denials for appeals that seem to have merit and should have been covered in the first place? Perhaps most importantly, what are the "secret ingredients" for a successful Medicare MCO appeal process? This session will address these issues as well as the necessary steps to take to successfully qualify an individual for Medicaid/Family Care.

Learner Objectives:

- Advance theories as to why there are so many Medicare Advantage plan denials and delays and discuss the impact of these denials/delays on resident quality of care.
- Outline a process to submit a successful appeal and suggest buzzwords or key phrases that might contribute to a successful appeal.
- Outline the steps for successfully qualifying an individual for Medicaid/Family Care.

Learner Level: Advanced

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



D22

What to Do When You Don't Want to Have a Talk

We've all had them – with co-workers, residents, family members, and even supervisors. Difficult conversations – we all hate them! This session will focus on the ins and outs, dos and don'ts, and how-tos of navigating difficult conversations. The goal is to shape the conversation in a positive direction with good outcomes but without offending the person with whom you are speaking.



Learner Objectives:

- Demonstrate the best method for beginning a difficult conversation.
- Outline the ground rules for working towards a good outcome in a difficult conversation.
- Discuss how and when to end a circular, difficult conversation when you cannot reach common ground.

Learner Level: Intermediate

Presenters: Thomas Schultz, HRCO Consultant, CLA, Green Bay, WI; Michael Peer, CPA, CHC, Principal, Health Care and Life Sciences, CLA, Milwaukee, WI

Thursday, October 5 - 3:15 p.m. to 4:15 p.m. (continued)



D23

Growing Beyond Our Boundaries: Developing a Stellar ISP

You asked – we deliver! In response to requests from CBRF providers, this interactive session will focus on how to develop a personalized ISP using the comprehensive assessment as a starting point. We will review the tools available on the LeadingAge Wisconsin website, including the ISP templates and decision trees. We will discuss the requirements and components of an ISP based on DHS 83.35. We will practice writing an ISP and learn how an ISP can be useful when completing an investigation and self-report. We will learn how to use the ISP as the basis for potentially difficult conversations with residents and families.



Learner Objectives:

- Demonstrate how to use the tools available on the Leading Age Wisconsin website.
- List the requirements and components of an ISP.
- Develop an ISP.
- Discuss how and when to refer to an ISP when doing an investigation and self-report.

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



D24

Life Safety for Long-Term Care and Beyond

Recent federal surveys reveal significant areas of concern related to the Life Safety Code (LSC). Are you in compliance? What steps can be taken to address and avoid emerging compliance issues. This session will explore and discuss the common compliance issues that face Wisconsin Long-term care and assisted living facilities in the area of Life Safety. The presenters will discuss the most pressing issues and how these can be addressed and potentially prevented. To further assist your compliance efforts, this session will also include tips on how to effectively document and organize your compliance efforts before and after your survey.



Learner Objectives:

- Identify the Top 10 Life Safety Code deficiencies to focus resources effectively.
- Outline how to monitor, document, and organize your compliance efforts.
- Discuss how to self-identify problems that require your immediate attention.

Learner Level: Intermediate

Presenters: David R. Soens, PE, RA, Life Safety Fire Authority, Division of Quality Assurance, Department of Health Services, Madison, WI; Jim Benedict, Vice President of Plant Operations, Milwaukee Catholic Home, Milwaukee, WI



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SCAN ME

Thursday, October 5 - Evening Events

- 4:15 p.m. to 7:00 p.m.** **Heavy Hors d'oeuvres / Light Dinner and Beverages at the 43rd Annual Exhibitors Forum**
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- **CLA (CliftonLarsonAllen)**
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- 6:30 p.m. to 7:00 p.m.** **Parade of Prizes at the Exhibitors Forum**
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- Beginning at 7:00 p.m.** **Night Out in Green Bay Sponsored by Various Business Partners**
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 - **ProCare HR**
 - **Blue Stone Therapy**
 - **CLA (CliftonLarsonAllen) - Booth #069**
 - **Ziegler Investment Banking - Booth #062**
- Event #2: Sponsor
- **Compass Community Living - Booth #002**
- Event #3: Sponsors
- **Pope & Conner Consulting, Inc. - Booth #053**

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Thursday, October 5, 2023 -- 4:15 p.m. to 7:00 p.m.

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Friday, October 6 - 8:30 a.m. to 9:30 a.m.



E25

Strategic Planning for Aging Services: Road Map for Managing Your Own Approach (Part 1)

For many aging services organizations, thinking about what's next and where we go from here is on a lot of minds. Strategic planning, once again, has emerged as a vehicle to consider these questions and others. But what really is strategic planning and how do we do it? This two-part session will discuss the role of strategic planning for aging services organizations, why it is essential and important, and how to actually start, lead, and accomplish a strategic planning process. We'll consider an overall approach in three broad steps, the roles of governance and leadership in the process, techniques and best practices along the way, and how to translate future aspiration into practical action. By the end of these two sessions, participants should feel armed with an approach, tools, and resources to guide their own planning process. (Discussion will continue in Session F31)

Learner Objectives:

- Outline the basics of strategic planning and broad steps in the process.
- Discuss the roles of governance and leadership in a planning process.
- Construct a strategic planning process for your aging services organization.

Learner Level: Advanced

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



E26

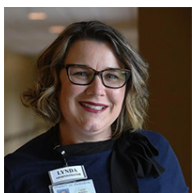
Surveyors and Providers: Growing as a Team

This session will feature an interactive, candid, unrehearsed, conversation between a long-term care provider and Ann Angell, Director of the Bureau of Nursing Home Resident Care. As we consider the mutual mission, realities, and practicalities of the responsibilities of both surveyors and providers, we will consider examples of interactions that explore the points of view of those involved in this essential relationship and how these points of view impact survey outcomes. We will discuss areas of conflict and collaboration and look for opportunities to build trust, even when we must agree to disagree, all in the interest of best serving the interests and well-being of our residents.



Learner Objectives:

- Provide examples of surveyor actions that contribute to a positive and empowering experience for long term staff members.
- Explore instances where providers effectively engage with surveyors, fostering productive communication and cooperation.
- Discuss strategies to enhance collaboration between providers and surveyors, ensuring the highest quality of care and service for the residents we serve.



Learner Level: Intermediate

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

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

Friday, October 6 - 8:30 a.m. to 9:30 a.m. (continued)



E27

Measuring Employee Commitment to Enhance Retention

LeadingAge Wisconsin members were invited to participate in an employee commitment survey. The results are in. This session will focus on the trends we identified through our employee commitment survey. What do these trends mean and how can members use this information to increase/enhance employee commitment and retention?

Learner Objectives:

- List the trends identified the commitment survey completed by member employees.
- Outline how employee commitment impacts employee retention.
- Develop an employee retention program based on what you have learned about employee commitment.

Learner Level: Intermediate

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



E28

Building A Magnetic Employee Value Proposition

Organizations with a strong employee value proposition (EVP) have lower turnover and increased new hire commitments – addressing two of the most frustrating challenges facing employers today. This session will provide insight into steps an employer can take to create an EVP to attract high-performing talent while solidifying and improving the relationship with employees.

Learner Objectives:

- Discuss the business case for developing an employee value proposition.
- Identify the essential elements of a magnetic EVP.
- Outline steps an organization can take to integrate EVP into talent attraction and retention strategy.

Learner Level: Intermediate

Presenter: Susan Morgan Bailey, SVP, Culture, Well-being & DEI Practice Leader, Marsh McLennan Agency, Troy, MI

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Conference Sessions E25 and F31

Strategic Planning for Aging Services: Road Map for Managing Your Own Approach
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Friday, October 6 - 8:30 a.m. to 9:30 a.m. (continued)



E29

WOW!! Did I REALLY See That?

INTERACTIVE Infection Prevention and Control for Assisted Living (Part 1)

This is not your typical educational session! Join us for a two-part highly interactive and moving learning experience for assisted living infection prevention and control! This first part of the discussion will provide participants with an engaging walk-through experience to test your knowledge of situations that may or may not meet standards of practice with infection prevention and control. How keen is YOUR eye for infection prevention and control breaches?

Learner Objective

- Identify at least five infection control breaches upon observation.

Learner Level: Intermediate

Presenter: Susan LaGrange, RN, BSN, NHA, CDONA™, FACDONA, CIMT, IP-BC™, Chief Nursing Officer, Pathway Health, Lake Elmo, MN



E30

Push Your Census Boundaries with Persona Branding (Part 1)

In a post-pandemic world, people still need care for rehab, acute conditions, and memory loss. In this interactive session, let's segment your ideal prospects for pushing the census boundaries. And then we'll build messaging around solving pains, including messaging that appeals to a younger, active demographic. (Discussion will continue in Session F36)



Learner Objectives:

- Define your "buyers" post-pandemic.
- Collaborate to build your ideal personas/resident types.
- Assign differentiated messaging to each persona for branding gold.

Learner Level: Advanced

Presenters: Dawn Wagenaar, Brand Strategist, Principal, Ingenuity Marketing Group, Saint Paul, MN; Christine Nelson, Communications Consultant, Ingenuity Marketing Group, Saint Paul, MN

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Friday, October 6, 2023 -- 9:30 a.m. to 9:45 a.m.

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Friday, October 6 - 9:45 a.m. to 10:45 a.m.



F31

Strategic Planning for Aging Services: Road Map for Managing Your Own Approach (Part 2)

Discussion will continue from Session E25

Learner Level: Advanced

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



F32

For an Organization to Grow Beyond their Boundaries – They Must First Start With a Success-Driven, Innovative Nursing Culture from Within

Senior Living in 2023 is exciting and invigorating—and yet intimidating with the constraints of regulatory compliance, workforce concerns, and strong customer expectations. A results-driven, invigorated nursing culture is necessary to move beyond traditional senior living and embrace processes that support optimal care, enable decision support and, ultimately, bring about a culture of success.

Learner Objectives:

- Outline the role of a supportive nursing culture.
- Discuss what nurses can do to address our healthcare environment's increasing complexity.
- Analyze the impact of rapid technological development in the clinical setting.

Learner Level: Intermediate

Presenter: Michelle Putz, Owner/Principal Consultant, PTZ Consulting, LLC, Muskego, WI



F33

Exempt or Non-Exempt: That Is the Question

If you don't fully understand the impact COVID had on overtime hours and your budget, you will want to join us for this session. We will explore the realities and practicalities of properly calculating overtime.

Learner Objectives:

- Define exempt and non-exempt as outlined in wage and hour regulations.
- Discuss how to properly calculate overtime pay and the consequences of not doing so.
- Develop a plan to update your overtime pay policies based on employee job descriptions and titles rather than on your organization's historical practices.

Learner Level: Intermediate

Presenter: Robert S. Driscoll, Shareholder, Reinhart Boerner Van Deuren, s.c., Milwaukee, WI

Friday, October 6 - 9:45 a.m. to 10:45 a.m. (continued)



F34

Staff Scheduling: Flexibility Is the Name of the Game

In this comprehensive learning course, participants will gain a deep understanding of the full-time equivalent (FTE) model and learn effective strategies to adapt it to their organization's specific needs. The course aims to empower employees by teaching them how to exchange shifts and find coverage, reducing instances of unscheduled absences and last-minute no-shows.



Learner Objectives:

- Discuss the full-time equivalent (FTE) model and how to adapt it to your organization.
- Develop a plan to empower employees to swap shifts and/or find coverage instead of calling in sick or no-showing.
- Demonstrate how to use a compressed workweek and a variety of scheduling options.

Learner Level: Intermediate

Presenters: Mary Schimke, BSN, RN, Nurse Consultant, Advanced Health Institute, Bloomington, MN; Robin Stern, MMSN, RN, RAC-CT IP, Nurse Consultant, Advanced Health Institute, Bloomington, MN



F35

WOW!! Did I REALLY See That?

INTERACTIVE Infection Prevention and Control for Assisted Living (Part 2)

Continuing from Session E29, participants will identify the findings and rationale from the hands-on interactive session. This presentation also will include active participation and discussion on creative approaches to competency and compliance with best practice approaches. Share your excellent practices with the group!

Learner Objectives

- List three infection prevention and control standards essential for all assisted living facilities.
- Discuss creative approaches for staff compliance with infection prevention and control.
- Identify where to locate resources for best practices in infection prevention and control.

Learner Level: Intermediate

Presenter: Susan LaGrange, RN, BSN, NHA, CDONA™, FACDONA, CIMT, IP-BC™, Chief Nursing Officer, Pathway Health, Lake Elmo, MN



F36

Push Your Census Boundaries with Channel Marketing Techniques (Part 2)

(Discussion will continue from Session E30) The best branding and marketing for senior living is personal and shareable. Now that you have identified your personas, let's work on some channel marketing techniques to personalize your approach and encourage sharing!



Learner Objectives:

- Define appropriate channel marketing for your community.
- Develop a channel marketing plan based on a chosen persona.
- Discuss how to track results and increase reach.

Learner Level: Advanced

Presenters: Dawn Wagenaar, Brand Strategist, Principal, Ingenuity Marketing Group, Saint Paul, MN; Christine Nelson, Communications Consultant, Ingenuity Marketing Group, Saint Paul, MN

Conference App

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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.

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