

# IGNITE



## 2024 ANNUAL MEETING & LEADERSHIP FORUM

Sept. 17-20 • Grand View Lodge, Nisswa

 **LeadingAge**<sup>®</sup>  
Minnesota

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# WELCOME TO

## LeadingAge Minnesota's Annual Meeting & Leadership Forum!

We look forward to seeing you at our annual leadership conference Sept. 17-20 at Grand View Lodge in Nisswa.

LeadingAge Minnesota's Annual Meeting & Leadership Forum is the foremost leadership conference for aging services leaders in the region—offering premium education, national speakers, and strategic, forward-thinking content and conversations. Content that gets you out of the weeds and thinking big-picture, next-gen, innovation, and what's possible for the future of our field.

Annual Meeting is intentionally held in a setting that offers a tranquil environment to escape the demands of daily work, prepare your mind for new ideas, and rejuvenate your body and spirit. The conference will include a blend of connections with colleagues new and old, thought-inspiring content, and fun.

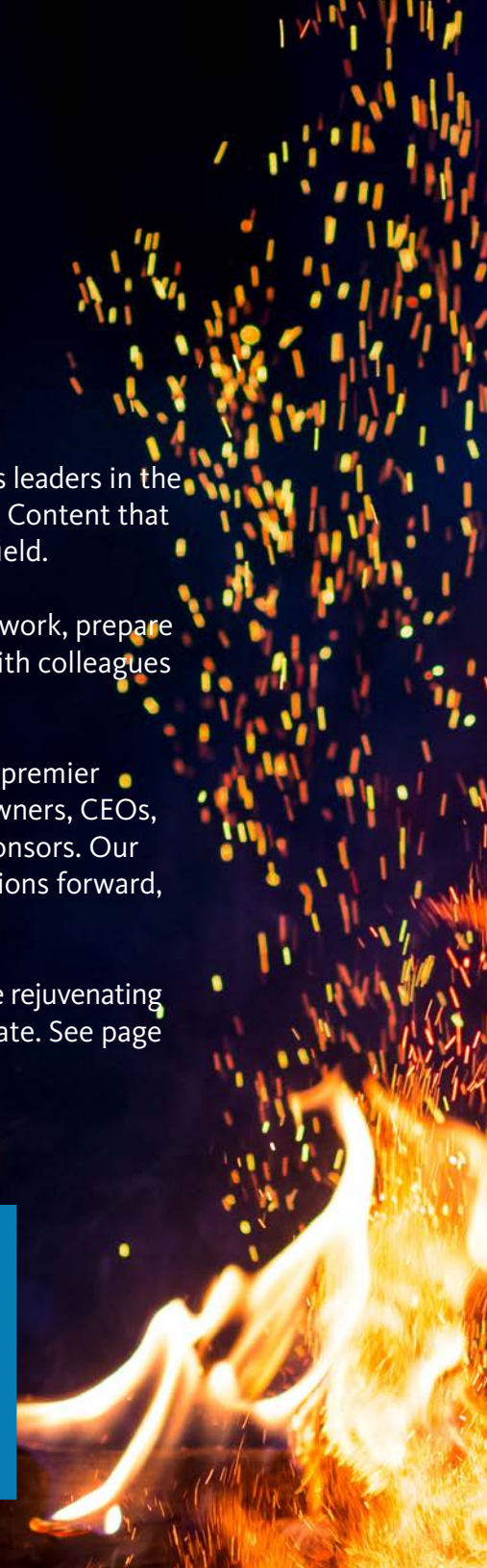
Many of our newer LeadingAge Minnesota members have asked, "Who attends Annual Meeting? Is it for me?" This premier experience is for executive-level, regional, and site leaders from aging services organizations. You'll join business owners, CEOs, COOs, CFOs, HR leaders, regional directors, and site leaders—as well as leading Business Partner members and Sponsors. Our Annual Meeting brings together people who are seeking strategic and innovative solutions to move their organizations forward, and who want to share meaningful dialogue with colleagues.

Grand View Lodge is located on Gull Lake and features dozens of amenities including two championship golf courses, the rejuvenating Glacial Waters Spa, a collection of distinctive dining venues, and some of the best resort accommodations in the state. See page 11 for some helpful tips as you plan your stay.

We hope to see you in September!

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# SCHEDULE OF EVENTS

## TUESDAY, SEPT. 17

Noon – 12:45 p.m.

**Golf Registration and Lunch** sponsored by **MCKESSON**

1 – 5 p.m.

**Golf Tournament**

6 – 8 p.m.

**Meet & Greet Reception** sponsored by  
Open to all Annual Meeting participants.



## WEDNESDAY, SEPT. 18

7:30 – 8:30 a.m.

**New Faces Breakfast** sponsored by **PDN**

*Passion for Dining and Nutrition*



New to Annual Meeting? We invite you to join other newer members over breakfast for a casual conversation and overview of the Annual Meeting experience – the sessions, activities, and networking opportunities available throughout the week. No pre-registration needed, but you must be a registered guest at Grand View Lodge on Tuesday evening or purchase breakfast onsite.

*Hosts: Jessica Lacher, Director of Membership, and Barbara Landeen, Senior Director of Leadership and Member Experience, LeadingAge Minnesota, Minneapolis*

# SCHEDULE OF EVENTS

## WEDNESDAY, SEPT. 18, *cont'd.*

8:45 – 11:30 a.m. Schedule includes a 15-minute break sponsored by **MCKESSON**

### Welcome and Opening Keynote

### Unlocking Innovative Solutions to Solve Problems and Create Opportunities

What if you had a systematic way to reveal new opportunities, uncover invisible barriers, and solve nearly any difficult problem?

### NOW YOU CAN

Join Stephen Shapiro for this hands-on keynote, where you will learn practical approaches to identifying solutions you never knew existed.

#### Part 1: Creating High-Performing Innovation Teams

To develop breakthrough solutions, you must first bring together divergent points of view. However, most make the fatal flaw of hiring only those people who “fit the company mold.” To help you create a high-performing and diverse innovation team, we will first play Stephen’s Personality Poker®. This fast-paced and interactive card game will help you:

- Create balanced teams that represent all personality styles (Playing with a Full Deck).
- Put the right people in the right roles (Playing to Everyone’s Strong Suit).
- Divide the work in a way that maximizes efficiency (Dealing Out Tasks).
- Bring together all styles to encourage collaboration (Shuffling the Deck).

#### Part 2: Finding Solutions to Important Opportunities

Next, we explore why asking better questions is key to finding better solutions. The questions you ask will determine what you see and what will remain hidden. This interactive section contains a powerful tool to reframe any problem in multiple ways-25 lenses that help you gain a different perspective. Packed with powerful stories, this session will give your team the skills to master any challenge. During this section, you will:

- Discover why we are hardwired to ask ineffective questions and how to work through those barriers.
- Understand the power and importance of well-defined questions.
- Reframe any problem in multiple ways to help you find the optimal solution.

**You won’t just leave with new concepts; you will have powerful tools you can apply every day.**

## STEPHEN SHAPIRO

*Stephen Shapiro started his innovation work 25 years ago while founding and leading a 20,000-person innovation practice at the consulting firm, Accenture. Since then, he has written seven books on innovation and has given speeches in 50 countries. In 2015, he was inducted into the Speaker Hall of Fame. When he is not on stage speaking about innovation, he enjoys making the impossible possible.*



# SCHEDULE OF EVENTS

## WEDNESDAY, SEPT. 18, *cont'd.*

11:30 a.m. – 12:45 p.m.

### Lunch

1 – 2 p.m.

### CONCURRENT SESSIONS

#### #1 – Finding Better Solutions: A Continuation of Opening Keynote

- Apply the 25 lenses to find solutions to your biggest challenge.
- Get real-time feedback to leave you with a deeper understanding of the reframing process.
- Discuss how to bring the process back to your team.

*Stephen Shapiro, Innovation Speaker, Author, Consultant, FAST Innovation, Orlando, Fla.*

#### #2 – Immigration as a Workforce Solution

- Explore the status of workforce and immigration policies at the federal and state level.
- Identify pathways to hiring immigrants in your communities.
- Discuss best practices to have in place before, during, and after the hiring process to create successful outcomes.

*Nicole Howell, Director, Workforce Public Policy, LeadingAge, Washington D.C.; and Rob Lahammer, VP of Engagement and Advocacy, Presbyterian Homes and Services, Roseville*

#### #3 – Trends for Senior Living Organizations

- Discuss occupancy, case mix, and rate trend impacts to senior living organizations.
- Project possible outcomes as a result of compression on occupancy, rents, and workforce.
- Discuss broad opportunities and challenges facing the senior housing sector.

*Jenny Boese, Healthcare Consultant Director, Dan Deyle, Principal, and Tyler Swenson, Principal, CLA, Minneapolis*

2 – 2:15 p.m.

Break sponsored by



# SCHEDULE OF EVENTS

## WEDNESDAY, SEPT. 18, *cont'd.*

2:15 – 3:15 p.m.

### CONCURRENT SESSIONS

#### #4 – Changing the Dialogue: Public Engagement in Advocacy

- Identify effective strategies for engaging with the public to build positive relationships and enhance the image of long-term care organizations.
- Discuss how to maintain productive relationships with local policy makers to advocate for the needs of older adults.
- Outline methods to get all levels of your organization effectively engaging with their communities to promote the benefits and necessity of long-term care services.

*Michelle Benson, MBA, Government Relations Consultant, MicraConsulting, Minneapolis; and Jeffrey D. Hayden, Senior Government Relations Specialist, Fredrikson, Minneapolis*

#### #5 – Developing a Nurse Staffing Strategy

- Identify the components of a comprehensive nurse staffing strategy.
- Outline best practices to enhance the well-being, professional growth, and job satisfaction of nursing staff to improve retention and performance.
- Discuss succession planning for nursing leadership positions from identifying potential leaders to providing development opportunities and ensuring a smooth transition of roles.

*Dr. Kari Everson, RN, LNHA, LALD, Vice President of Clinical Services, LeadingAge Minnesota, Minneapolis and President, Evercare Aging Services Consulting, Woodbury*

#### #6 – Home Health and Hospice: Expanding Your Continuum of Care

- Identify the range of services available to care for older adults where they call home.
- Describe the current landscape of care, where have we come from and what is the “future.”
- Discuss legislative and administrative developments from 2024 and possible future changes.

*Mollie Gurian, Vice President, Home-Based and HCBS Public Policy, LeadingAge, Washington D.C.*

3:15 p.m.

8 – 10 p.m.

#### Jigsaw Puzzle Contest

Calling all puzzle enthusiasts! Put your puzzling skills to the test as teams work to complete their 300-piece puzzles. Prizes will be awarded to first and second place teams. Complimentary snacks and beverages will be provided.

8 – 8:30 p.m. Gather and build a team. Grab a drink and a snack before the main event starts!

8:30 – 10 p.m. Speed puzzling contest starts promptly at 8:30 p.m.

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# SCHEDULE OF EVENTS

## THURSDAY, SEPT. 19

8 – 9 a.m.

### Annual Business Meeting

The Annual Business Meeting is an important function of the Association and membership. Please plan to attend for the election of officers and other important association business.

9 - 9:15 a.m.

### Break sponsored by **MCKESSON**

9:15 – 10:15 a.m.

### General Session

### Leader to Leader Panel: Ignite

Hear from this year's panel of leaders as they explore a wide range of topics including, but not limited to, short- and long-term sustainability, organizational positioning, community engagement and partnerships, and growing emerging leaders.

*Panelists: Brett Anderson, MSN, RN, NE-BC, President @ CEO, Ebenezer, Edina; Traci Beach Larson, President/CEO, Guardian Angels Senior Services, Elk River; Daniel Lindh, President @ CEO, Presbyterian Homes and Services, Roseville; Jon Riewer, President @ CEO, Eventide Senior Living Communities, Moorhead; and Nate Schema, President @ CEO, Evangelical Lutheran Good Samaritan Society, Sioux Falls, S.D.*

*Facilitator: Kari Thurlow, President @ CEO, LeadingAge Minnesota, Minneapolis*

10:15 – 10:30 a.m.

### Break sponsored by **MCKESSON**

10:30 – 11:30 a.m.

### General Session

### Working Smarter, Not Harder

The current workforce and economic constraints pose significant challenges to providing care to older adults where and when they need it. By leveraging technology, we can create a more flexible and responsive care model that better meets the needs of older adults.

- Examine the state of post-acute and long-term care within the healthcare continuum.
- Identify the opportunities and challenges of home health care from a technology and workforce perspective.
- Discuss how long-term care organizations can begin considering technology solutions and planning for the future of care.

*Antoinette Thomas, Worldwide Chief Experience Officer, Microsoft, Cleveland, Ohio*

11:30 a.m. – 12:45 p.m.

### Lunch



# SCHEDULE OF EVENTS

## THURSDAY, SEPT. 19, *cont'd.*

1 – 2 p.m.

### CONCURRENT SESSIONS

#### #7 – Quality for Leaders: Work as Imagined Versus Work as Done

- Distinguish between "work as imagined" (how processes are designed and documented) and "work as done" (how processes are performed in real-world settings).
- Develop effective communication strategies and feedback loops that encourage staff to share their challenges related to "work as done."
- Apply adaptive quality improvement techniques that bridge the gap ensuring that policies, training, and resources align with the practical needs and constraints of staff.

*Jane Pederson, MD, Chief Medical Quality Officer, Stratis Health, Bloomington*

#### #8 – Strategies for Growing Beyond Bricks-and-Mortar Offerings

- Summarize the benefits and drawbacks of organic growth versus growth via agency acquisitions.
- Identify possible partnership and joint venture structures for alternative service lines.
- Outline how to effectively integrate additional service lines to complement existing offerings.

*Marnie Gugisberg, Chief Financial Officer, Knute Nelson | Walker Methodist, Alexandria; Christina Rappl, Senior Vice President, Ziegler, Minneapolis; and Kathy Youngquist, Chief Financial Officer, Cassia, Edina*

#### #9 – Technology for Leaders in Long-Term Care: A Panel Discussion

- Discover technology solutions that are making a significant impact in supporting staff and improving resident care.
- Identify practical strategies for assessing readiness for new technologies and evaluating options.
- Discuss best practices for leading successful implementation of new technology solutions and ensuring long-term success.

*Panelists: Autumn Herzog, LNHA, Administrator/Director of HR, Browns Valley Health Center, Browns Valley; Anna Petersmeyer, Executive Vice President and COO, Vista Prairie Communities, Champlin; Heather Sellers, RN, LNHA, LALD, VP of Operations/COO, Spring Valley Living, Spring Valley; and Brittney Thoreson, VP of Operations, Knute Nelson Walker Methodist, Alexandria*  
*Facilitator: Anneliese Peterson, SVP, Operations/COO, Benedictine, Minneapolis*

2 – 2:15 p.m.

Break sponsored by



# SCHEDULE OF EVENTS

## THURSDAY, SEPT. 19, *cont'd.*

2:15 – 3:15 p.m.

### CONCURRENT SESSIONS

#### #10 – Financial Planning for CMS Staffing Rule and Workforce Standards Board Rule

- Identify the financial implications of new federal and state policies for nursing homes.
- Evaluate the costs included in increased staffing and wage levels that will impact your organization.
- Discuss the components of a comprehensive financial plan to budget for these expenses.

*Jenny Boese, Healthcare Consultant Director, Dan Deyle, Principal, Tyler Swenson, Principal, and Greg TaBelle, CPA, Reimbursement Director, Health Care CLA, Minneapolis*

#### #11 – Strategic Considerations in Service and Resident Mix in Assisted Living

- Identify various payer mix strategies and their importance in the financial stability of Assisted Living settings.
- Discuss best practices for using resident information and assessments to optimize your case mix.
- Develop strategies to align service offerings and resident mix with your financial goals.

*Janet Perreault, RN, LALD, Director of Reimbursement, Cassia, Minneapolis; Rick Shamberg, Managing Director, Scarp Ridge Capital Partners, New York; and Erin Shvetzoff Hennessey, Chief Executive Officer, Health Dimensions Group, Hopkins*

#### #12 – Providing Services Beyond Your Walls: A Panel Discussion

- Identify the benefits of home care for older adults and long-term care organizations.
- Discuss challenges and opportunities providers face in adding home care to their service line.
- Outline effective approaches for expanding HCBS delivery, including the integration of technology and collaboration with community resources to meet diverse older adult needs.

*Panelists: April Collman, Executive Director, Adult Day Services Inc., Bemidji, Nathan Johnson, CEO, PioneerCare Center, Fergus Falls; and Jeff Thorne, President and CEO, Our Lady of Peace, St. Paul*  
*Facilitator: Facilitator to be announced*

3:15 p.m.

**Adjourn for the Day**



8 – 10:30 p.m.

#### Trivia Mafia

Join us for a fun night of trivia hosted by Trivia Mafia. Compete with others testing your knowledge on various trivia questions. Be prepared to use your noodle, not your Google. The trivia team that ends up with the highest score is the winner, reaping bragging rights and a prize.

Complimentary snacks and beverages will be provided.

8 – 8:30 p.m. Gather and build a 3-to-5-person team. Grab a drink and a snack before the main event starts!

8:30 – 10:30 p.m. Trivia starts promptly at 8:30 p.m.

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# SCHEDULE OF EVENTS

## FRIDAY, SEPT. 20

9 – 11:45 a.m. *Schedule includes a 15-minute break*

### General Session

## Mission-Critical Leadership: How Smart Managers Lead Well in All Directions

Most leadership development focuses on a single direction within the organizational hierarchy: downstream to subordinates. While it is important to be a good boss, leadership is much more than that. The best leaders learn to lead well in all directions. They lead upward to superiors and across among peers throughout the organization, as well as equipping their teams to do the same. And it all starts with self-leadership. This often overlooked or misunderstood leadership principle is essential to build a thriving and productive culture.

In this highly interactive workshop participants will:

- Discover self-leadership practices and strategies to develop in yourself.
- Examine how to effectively expand your influence beyond your direct reports to lead up and across in your organization.
- Map out strategies to broaden your leadership impact and share your learning with your team using a coaching worksheet.

Books will be available for sale after the presentation. All participants will be provided a downloadable chapter of the book and a coaching worksheet to apply the principles learned in their community.

11:45 a.m.

### Conference Adjourns

*General Session is sponsored by*

**Fredrikson**

## JON LOKHORST

*Jon Lokhorst, CSP, CPA, PCC, is a leadership coach, corporate trainer, keynote speaker, and the author of Mission-Critical Leadership: How Smart Managers Lead Well in All Directions. He works with organizations to develop leaders everyone wants to follow, build teams no one wants to leave, and deliver exceptional results. Before launching Your Best Leadership LLC, Jon enjoyed a 30-plus year career as a CPA, CFO, and organizational leader. He has a master's degree in organizational leadership and is recognized by the International Coach Federation as a Professional Certified Coach.*



# ANNUAL MEETING HELPFUL TIPS

We want Annual Meeting to be an exceptional experience for you and hope these tips will help. If you have any questions at all – big or small – reach out to Jenny Prosser at [jprosser@leadingagemn.org](mailto:jprosser@leadingagemn.org).

## Plan Your Stay at Grand View Lodge

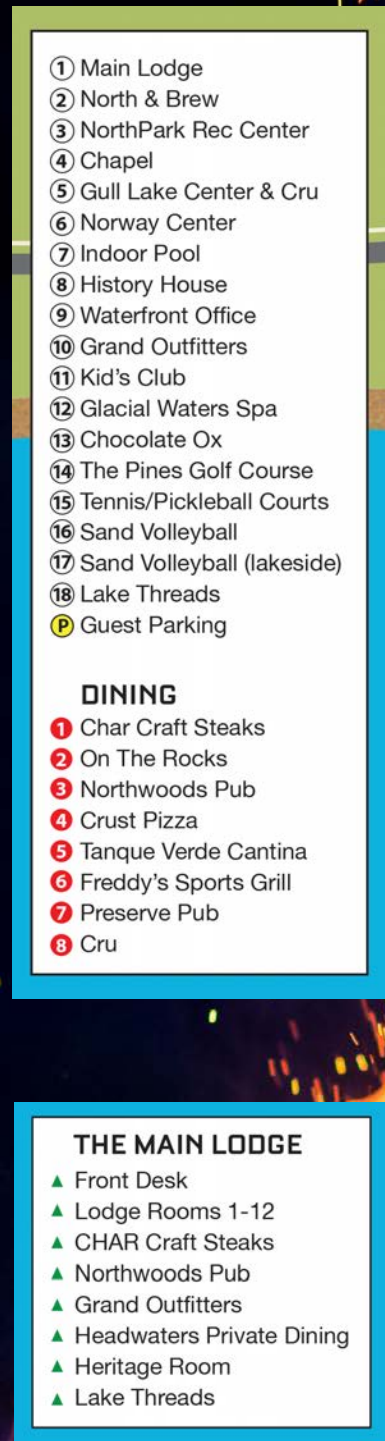
- View a resort map to familiarize yourself with the property.
- The Main Lodge and Gull Lake Center is the heart of Grand View Lodge where most events take place and where most of the dining venues are located.
- Event and Lodging Locations:
  - » A variety of lodging options include guest rooms in the Main Lodge, a boutique hotel (North), and cabins, studios, homes, and cottages in varying sizes to accommodate groups. All check-ins are at the Main Lodge.
  - » The meeting portion of Annual Meeting will be held in Gull Lake Center (#5).
  - » Breakfasts and lunches will be in the Main Lodge (#1).
- Resort check-in time is 4:30 p.m. and check out time is 11 a.m.
- Complimentary resort-wide shuttle service will be available for all Annual Meeting participants. Remember to bring comfortable walking shoes!
- Book [golf tee times](#), [spa appointments](#), and/or [dinner reservations](#) well in advance.

## Fun Facts About Grand View Lodge

- 2,500 feet of sandy beach
- 125+ miles of bike trails
- Two golf courses, 36 holes of championship golf
- 70+ spa services
- 20+ complimentary resort activities from bonfires to paddleboarding to pickleball
- Eight dining venues
- Two coffee shops

## Registration and Event Information

- Annual Meeting registration is done in three steps:
  - 1) Conference registration;
  - 2) Golf tournament (optional); and
  - 3) Grand View lodging (optional).
- You may choose to stay at Grand View Lodge or not. The Grand View's packages include lodging and breakfasts.
- Looking for dinner options or a fun group to dine with? Contact Jessica Lacher at [jlacher@leadingagemn.org](mailto:jlacher@leadingagemn.org).
- The Golf Tournament on Tuesday is a fun event that is welcoming to every level golfer.
- Take advantage of the reception on Tuesday evening. It's where people gather to meet and mingle in a casual atmosphere before the conference begins.
- New to Annual Meeting? Join us at Wednesday morning's New Faces Breakfast for an insider's guide to Annual Meeting and to meet other members new to the event.
- Attend the evening events on Wednesday and Thursday nights to have some fun and network with your peers.
- Be sure to attend Thursday morning's Annual Business Meeting for the election of officers and other important association business.
- There is free time built into the conference schedule for you to take advantage of the amenities, recreational opportunities, or just relax.
- It's casual attire – no business suits required!



# REGISTRATION

Register separately for 1) Conference, 2) Golf tournament, and 3) Grand View lodging.

For full conference details and registration forms visit <https://www.leadingagemn.org/education-events/annual-meeting/>.

## STEP 1: CONFERENCE REGISTRATION

Select your conference attendance (full conference or single day) and your education sessions.

**REGISTER HERE**

**Conference Registration  
Fees – Rates held  
to 2023 Levels**

	Early Bird Rate on or before Aug. 16			Regular Rate Aug. 17 or after		
	Single Day (Wednesday or Thursday)	Single Day (Friday)	Full Conference	Single Day (Wednesday or Thursday)	Single Day (Friday)	Full Conference
<b>Member Provider</b>	\$280	\$235	\$550	\$305	\$260	\$600
<b>Prospective Provider Member</b>	\$395	\$330	\$770	\$420	\$460	\$820
<b>Business Partner Member</b>	\$375	\$330	\$700	\$400	\$355	\$750
<b>Prospective Business Partner</b>	\$525	\$460	\$980	\$550	\$485	\$1,030

Full conference registration is Sept. 17-20. Full conference rates include morning breaks on Wednesday, Thursday, and Friday; lunch on Wednesday and Thursday; afternoon breaks on Wednesday and Thursday.

Wednesday and Thursday single day rates include morning and afternoon breaks and lunch. Friday single rate includes a morning break. Lodging and breakfasts not included.

**Early Bird conference  
registration deadline:  
Friday, Aug. 16, 2024.**  
Registrations received Aug. 17 or after  
will be charged the regular rate.

# REGISTRATION AND GENERAL INFORMATION

## STEP 2: GOLF TOURNAMENT (Optional)

Complete the separate Golf Tournament online registration form.



### GOLF REGISTRATION FORM

**Early Bird golf registration deadline: Friday, Aug. 16, 2024.**

Registrations received Aug. 17 or after will be charged the regular rate.

<i>The fees listed are for providers only.</i>	<b>Early Bird Rate on or before Aug. 16</b>	<b>Regular Rate Aug. 17 or after</b>
<b>Provider Member/Prospective Provider Member</b>	\$165	\$180
<b>Business Partners</b>	Contact Jenny Prosser for sponsor rates. <a href="mailto:jprosser@leadingagemn.org">jprosser@leadingagemn.org</a>	

## STEP 3: LODGING (Optional)

Grand View Lodge is sold out! If you do not have your lodging accommodations confirmed, we suggest our overflow hotel, Holiday Inn Express & Suites in Baxter.

The Holiday Inn is approximately 11 miles away from Grand View Lodge. To make reservations, use [this booking link](#) to guarantee the discounted, negotiated room rate of \$135-141 (depending on room type selected). Room rate includes breakfast.

**BOOK YOUR LODGING WITH HOLIDAY INN EXPRESS & SUITES HERE**

**Holiday Inn Express & Suites room block will release on Tuesday, Sept. 10, 2024.**

## STEP 4: NOTE THE CANCELLATION POLICY

**Conference Registration:** Registration fees (less a \$25 processing fee) are refundable if LeadingAge Minnesota receives written cancellation notice no later than Friday, Sept. 6, 2024. No refund for cancellations made after the deadline or for no-shows.

**Grand View's Lodging Reservation:** Lodging fees are fully refundable if Grand View Lodge receives cancellation notice no later than 4 p.m. CST on Monday, Sept. 9, 2024. No refund for cancellations made after the deadline or no-shows. Replacements are gladly accepted.

## Continuing Education Credits

The educational programming for Annual Meeting meets the CEU approval criteria for the Minnesota Board of Executives for Long Term Services and Supports (MN-BELTSS). It has been designed to meet the continuing education approval of the Minnesota Board of Nursing. General certificates of attendance will also be available for housing managers and others. Association business meetings and information-only sessions do not meet the CEU approval criteria of these licensure boards. For further information, contact Sharon Hollister at [shollister@leadingagemn.org](mailto:shollister@leadingagemn.org).

# SCHOLARSHIPS AVAILABLE

Five full conference scholarships to the 2024 Annual Meeting & Leadership Forum are available to provider members facing financial hardship, courtesy of the following 2024 Annual Sponsors:



[To apply, click here.](#)

**Submit your application by Friday, Aug. 16, 2024.**

Applicants will be notified of their status by the end of August; those not awarded are eligible to register at the early bird registration fee. Applications will be kept confidential.



LeadingAge Minnesota's Executive Leadership Masterclass for Aging Services Professionals is designed to refine leadership skills, foster strategic thinking, cultivate valuable professional networks, and equip participants with the aptitude and confidence required to excel. It is suited for executive leaders, newly appointed executives, and those being primed for executive succession.



I highly recommend the Executive Leadership Masterclass. As someone who recently transitioned from daily operations to an executive role, this class has provided me with tools and resources to enhance my effectiveness in this new position.

*Melissa Schneider, Chief Operating Officer, Episcopal Homes of Minnesota, 2024 Masterclass participant*

**[Now accepting applications for the 2025 Cohort through Nov. 11, 2024.](#)**