

A low-angle, close-up shot of an astronaut's legs and feet in a white space suit, walking on the dark, rocky surface of the moon. The astronaut's right foot is planted on the ground, while the left foot is lifted in mid-stride. The background is a vast, dark space filled with stars and a large, bright, glowing orb, likely the Earth or the sun, creating a dramatic and inspiring atmosphere.

LeadingAge[®]
Minnesota

COURAGEOUS THINKING

2025 INSTITUTE & EXPO

March 4-6, Virtual

2025 LeadingAge Minnesota Annual Sponsors

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VIRTUAL SESSION SCHEDULE

Tuesday, March 4

TRACKS FOR SESSIONS

AL – Assisted Living
 ADS – Adult Day Services
 CC – Care Centers
 Deep Dive – for experienced professionals with prior topic knowledge

HCBS – Home- and Community-Based Services
 Peer Genius – providers sharing expert, hands-on insights
 SH – Independent Senior Housing

CEU TYPE	TODAY'S SESSIONS ELIGIBLE FOR HOURS/UNITS
MN Board of Long Term Services and Supports	All sessions
MN Board of Social Work	V1102, V1103, V1201, V1202, V1301, V1302
MN Board of Nursing	V1201, V1202, V1301, V1302, V1303
National Certification Council for Activity Professionals	V1102, V1103, V1201, V1202, V1301, V1302
Certifying Board for Dietary Managers and Association of Nutrition and Food Service Professionals	V1202

Note: Sessions have been submitted for board approval of continuing education activities. Final approval will be posted when received. General certificates will also be available to submit to other credentialing bodies.

8:30 – 9:30 a.m.

CONCURRENT SESSIONS

V1101 – Understanding Changing Expectations: Media Coverage and Risk Management (All Settings; Deep Dive)

- Describe the impact of intense media attention on long-term care communities.
- Summarize the new legal risks facing senior care leaders.
- Discuss risk management actions that promote organizational defensibility.

Drew Graham, Attorney at Law, Hall Booth Smith, P.C., New York, N.Y.; and Cyndi Siders, RN, MSN, CPHRM, CPPS, Executive Consultant, Siders HealthCare Consulting, LLC, Grand Forks, N.D.

VIRTUAL SESSION SCHEDULE

Tuesday, March 4, *cont'd.*

TRACKS FOR SESSIONS

AL – Assisted Living

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V1102 – Contemplative Strategies for Activities and Wellbeing (All Settings; Peer Genius)

- Employ mindfulness and heightened awareness in activities to enhance engagement and enrich sensory experiences for individuals coping with memory loss or dementia.
- Define Sacred Idleness and explain its benefits. Explore methods to seamlessly incorporate it into your resident's daily routines.
- Explore methods to incorporate Mindfulness, Awareness, and Sacred Idleness into your own daily schedule to help with burnout and compassion fatigue.

Shane Hoffman, Life Enrichment Director, Samaritan Bethany, Stewartville

V1103 – Leading a Service-Based Organization from Darkness into Light (All Settings)

- Understand the importance of trust in motivating staff, building positive relationships, and communicating openly and honestly.
- Embrace the balance between risk-taking and foundational principles as staff adapt to added responsibilities and growth.
- Create an environment where accountability is understood yet cooperation and collaboration prevail.

Petra Marquart, CEO/Program Developer, See ME Inc., Minnetonka

9:30 – 10 a.m.

Break

10 – 11 a.m.

CONCURRENT SESSIONS

V1201 – Compassion Fatigued: Compassionately Satisfied - Part 1 (All Settings; Deep Dive)

Participants are strongly encouraged to attend Part 1 and Part 2. See V1301.

- Compare and contrast stress and burnout with compassion fatigue.
- Identify personal risk factors for compassion fatigue.
- Articulate measures to prevent compassion fatigue and pursue compassion satisfaction.

Lores Vlaminck MA, BSN, RN, CHPN, Lores Consulting, LLC, Rochester

V1202 – The Managed Care Playbook: Strategies to Get Paid What You Deserve (AL, CC)

- Understand the Impact of Managed Care on Financial and Operational Performance: Identify key challenges, including low reimbursement rates and administrative burdens, and how they affect your bottom line.
- Be Able to Apply Effective Strategies for Optimizing Managed Care Billing: Learn actionable techniques for verifying coverage, tracking denials, and appealing claims to improve collections.
- Develop a Proactive Approach to Navigating Managed Care Challenges: Discover how collaboration, training, and external support can drive consistent payment and improve financial outcomes for your facility.

Kristy Brown, Director of SNF Strategy, Quality Healthcare Resources, Lakewood, N.J.

VIRTUAL SESSION SCHEDULE

Tuesday, March 4, *cont'd.*

TRACKS FOR SESSIONS

AL – Assisted Living

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V1203 – Risk Insights During a Transaction: Mergers, Acquisitions, and Beyond (All Settings; Deep Dive)

- Understand key risk areas during a transaction.
- Understand the legal perspective when there is a change in ownership (CHOW).
- Take back practical solutions to implement within your perspective community before/during/after a transaction.

Sara Kekula, Partner and Director of Senior Living and Social Services Practice Group, M3 Insurance, Madison, Wis., and Talia Pletcher, Risk Manager, M3 Insurance, Minneapolis; and Robert Rodè, Partner, Rodè @ Coffin, LLC, St. Paul

11 – 11:30 a.m.

Break

11:30 a.m. – 12:30 p.m.

CONCURRENT SESSIONS

V1301 – Compassion Fatigued: Compassionately Satisfied - Part 2 (All Settings; Deep Dive)

Participants are strongly encouraged to attend Part 1 and Part 2. See V1201.

- Compare and contrast stress and burnout with compassion fatigue.
- Identify personal risk factors for compassion fatigue.
- Articulate measures to prevent compassion fatigue and pursue compassion satisfaction.

Lores Vlaminck MA, BSN, RN, CHPN, Lores Consulting, LLC, Rochester

V1302 – Advancing the Mental Health First Aid Movement for Long-Term Care (All Settings)

- Discuss the prevalence of mental health illnesses and their impact on the workplace.
- Understand the components of the Adult Mental Health First Aid (MHFA) Certification.
- Engage in an interactive activity to practice listening nonjudgmentally.

Rebecca Peine, EdD, Mental Health First Aid Certified Instructor, Winona State University, Winona

V1303 – What We Learned From the CMS 5 Claim Probe Audits (CC)

- Examine trends and results from the national CMS 5 Claim Probe audit project.
- Understand common reasons that led to payment adjustments or denials.
- Learn how to strengthen critical documentation to prevent negative financial outcomes.

Mary-Beth Newell, RN, BSN, MS, RAC-CT, CPHQ, Senior Director of Clinical Reimbursement Operations, MDS Solutions, Sarasota, Fla.

VIRTUAL SESSION SCHEDULE

Wednesday, March 5

TRACKS FOR SESSIONS

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CEU TYPE	TODAY'S SESSIONS ELIGIBLE FOR HOURS/UNITS
MN Board of Long Term Services and Supports	All sessions
MN Board of Social Work	V1502, V1601, V1603
MN Board of Nursing	V1403, V1501, V1601
National Certification Council for Activity Professionals	V1601, V1603
Certifying Board for Dietary Managers and Association of Nutrition and Food Service Professionals	V1601

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8:30 – 9:30 a.m.

CONCURRENT SESSIONS

V1401 – Know Your Cheerleaders: Strategies to Better Alignment With Your Board (AL, CC, SH; Deep Dive)

- Identify the key characteristics of supportive board members who can act as "cheerleaders" for your organization.
- Understand the strategies necessary to cultivate strong relationships with these board members to enhance operational alignment and board support.
- Learn techniques to leverage these relationships to influence and gain the backing of the broader board for critical initiatives.

Erin Shvetzoff Hennessey, NHA, CPG, CEO, and Sharon Thole, LNAH, LALD, Executive Vice President, Operations, Health Dimensions Group, Hopkins

VIRTUAL SESSION SCHEDULE

Wednesday, March 5, *cont'd.*

TRACKS FOR SESSIONS

AL – Assisted Living

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Deep Dive – for experienced professionals with prior topic knowledge

HCBS – Home- and Community-Based Services

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V1402 – Leveraging State of the Art Technology for Healthcare Organizations (All Settings; Deep Dive)

- Recognize the five trends changing how healthcare organizations monitor key performance indicators and manage financial information with data-driven automated technology.
- Identify healthcare trends impacting technology adoption: growth through consolidation, cost-reduction initiatives, evolving regulatory requirements, and the shift to consumer-driven healthcare.
- Discuss how to evaluate and implement technology that will be impactful and profitable in your organization.

Rebecca Hurst, CPA, Senior Manager Financial and Operational System, Wipfli LLP, Reston, Va.

V1403 – Medicare Certified Home Care Agency Updates and Survey Findings (HCBS)

- Identify recent findings and citation trends for Medicare certified home care agencies.
- Understand the current survey process, updates and changes to Home Care Conditions of Participation (CoP's) based on QSO-24-07-HHA, and the guidance from QSO-24-11-HHA & Hospice.
- Discuss the guidance and expectations related to bed rail safety in home care.

Kathy Lucas, RN, Regional Operations Manager, Health Regulation Division, Minnesota Department of Health, St. Cloud

9:30 – 10 a.m.

Break

10 – 11 a.m.

CONCURRENT SESSIONS

V1501 – Importance of Deprescribing for Older Adults (AL, CC)

- Understand what deprescribing is and why it is important.
- Identify common scenarios where deprescribing may be an option (e.g., polypharmacy).
- Be able to communicate key concepts about deprescribing with the prescriber, pharmacist, and resident/family.

Amelia Palmer, PharmD, BPS, Clinical Manager, Omnicare, A CVS Company, Urbandale, Iowa

V1502 – Disability Waiver Updates (ADS, AL, HCBS)

- Understand recent updates to the Disability Waiver Rates System and future updates to those rates.
- Discuss disability waiver requirements for settings where waiver services are delivered.
- Receive timely updates on the Waiver Reimagine initiative.

Peter Beierwaltes, Program Integrity Team Lead, Stephen Horn, LSW, HCBS Waiver Policy Lead, and Sharla Scullen, Disability Services Division Fiscal

VIRTUAL SESSION SCHEDULE

Wednesday, March 5, *cont'd.*

TRACKS FOR SESSIONS

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Policy Lead, Minnesota Department of Human Services, St. Paul

V1503 – National Legal Trends in Long-Term Care (AL, CC)

- Identify current legal issues and trends impacting long-term care providers.
- Review examples of recent legal cases, evolving regulatory requirements, and agency enforcement activity.
- Discuss proactive strategies to support compliance and risk management by applying lessons from industry trends.

Jon Lips, Vice President of Legal Affairs, LeadingAge, Washington, D.C.

11 – 11:30 a.m.

Break

11:30 a.m. – 12:30 p.m.

CONCURRENT SESSIONS

V1601 – Fostering Resident, Family, and Staff Relationships to Manage Complaints (AL, CC)

- Describe communications skills for fostering relationships and managing expectations.
- Review key elements of complaint and grievance management.
- Analyze responses to challenging situations that support relationships.

Cyndi Siders, RN, MSN, CPHRM, CPPS, CEO/Executive Consultant, Siders HealthCare Consulting, LLC, Grand Forks, N.D.

V1602 – Minnesota Housing: MHFA and HUD Updates (HCBS, SH)

- Identify recent changes in HUD regulations and their impact on housing policies, including updates from the Housing Opportunity through Modernization Act (HOTMA).
- Examine the NSPIRE physical property inspection standards and understand their implications for your setting.
- Describe Risk-Based Monitoring - Management and Occupancy Review procedures and protocols.

Jes Christiansen, COS, TCS, Senior Housing Management Officer, Minnesota Housing, St. Paul

V1603 – Evolving Landscape of Senior Living: Engagement for Changing Demographics (All Settings)

- Understand how demographic changes in senior spaces, including aging residents and multigenerational caregiving dynamics, impact service needs and expectations.
- Identify strategies for fostering inclusive environments that accommodate diverse needs, such as support animals and residents with unique family structures.
- Explore approaches to engagement that reflect the evolving profile of today's senior living consumers.

Avi Olitzky, President and Principal Consultant, Olitzky Consulting Group, LLC, Minneapolis

VIRTUAL SESSION SCHEDULE

Thursday, March 6

TRACKS FOR SESSIONS

AL – Assisted Living
 ADS – Adult Day Services
 CC – Care Centers
 Deep Dive – for experienced professionals with prior topic knowledge

HCBS – Home- and Community-Based Services
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 SH – Independent Senior Housing

CEU TYPE	TODAY'S SESSIONS ELIGIBLE FOR HOURS/UNITS
MN Board of Long Term Services and Supports	All sessions <small>V1702, V1803, V1902</small>
MN Board of Social Work	V1702, V1803, V1902
MN Board of Nursing	V1701, V1703, V1803, V1901, V1902, V1903
National Certification Council for Activity Professionals	V1702, V1703, V1802, V1803, V1902
Certifying Board for Dietary Managers and Association of Nutrition and Food Service Professionals	V1802

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8:30 – 9:30 a.m.

CONCURRENT SESSIONS

V1701 – Clinical and Operational Requirements for Nurses and Directors in Assisted Living (AL)

- Gain an understanding of the regulatory landscape, highlight the need for nurses and LALDs to be well-versed in both clinical and operational positions.
- Identify key clinical aspects that demand attention by the nurse and acquire insights into the operational aspects.
- Discuss practical and effective strategies to provide support for nursing staff and promote a collaborative and efficient care environment.

Julie Dietz, RN, PHN, Vice President of Community Based Services, Senior Care Solutions, Stillwater

VIRTUAL SESSION SCHEDULE

Thursday, March 6, *cont'd.*

TRACKS FOR SESSIONS

AL – Assisted Living

ADS – Adult Day Services

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Deep Dive – for experienced professionals with prior topic knowledge

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V1702 – How Social Determinants of Health Impact the Health of Your Workforce (All Settings)

- Describe the social determinants of health (SDoH), their impact on health, and strategies to review publicly available SDoH metrics.
- List concerning health outcome and utilization trends attributed to employees with lower wages and the “why” behind these trends.
- Develop strategic SDoH solutions incorporating relevant community, health plan, employer, and public solutions.

Heidi Orstad, DNP, Clinical Consultant, Marsh McLennan Agency, Minneapolis

V1703 – Embracing Continuous Improvement: A Strategic Path to Organizational Excellence (All Settings)

- Identify ways to navigate change with limited financial and human resources to implement quality improvement initiatives.
- Understand how to effectively deal with staff and management when there is resistance to new procedures or technology or there are communication barriers.
- Discuss best practices to sustain improvements and keep the momentum of quality initiatives ongoing especially when the initial enthusiasm wanes down.

Julie Karafa, Manager, Healthcare Consulting, Wipfli LLP, St. Charles, Mo.

9:30 – 10 a.m.

Break

10 – 11 a.m.

CONCURRENT SESSIONS

V1801 – Limiting the Risk of Employee Turnover Through System Optimization (All Settings)

- Identify where and to what level the turnover risk exists in the financial reporting function of the organization.
- Develop a plan to mitigate the turnover risk and assess the need to begin succession planning for any expected retirements.
- Discuss the role technology and software applications can play in reducing risk and creating workforce efficiencies.

Kelly Rousar, Outsourced Controller, and Matthew Wocken, CPA, Principal, CLA, Minneapolis (invited)

V1802 – A Force Multiplier for Employee Engagement and Retention (All Settings; Deep Dive)

- Apply a retention strategy that leverages meaningful employee communication as a force multiplier for engaging employees.
- Describe five dimensions of engagement that, in combination, create a workplace where people want to stay and give their best.
- Adopt a continuous improvement approach to sustain an engaging workplace.

Caryne Kinne, Chief Operating Officer, Align, Wausau, Wis.

VIRTUAL SESSION SCHEDULE

Thursday, March 6, *cont'd.*

TRACKS FOR SESSIONS

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V1803 – Purpose Driven Behavioral Health Assessments (AL, CC, HCBS; Deep Dive)

- Articulate an understanding of what a behavioral health assessment is and how to initiate one.
- Identify common scales utilized during a behavioral health assessment.
- Use information gathered in a behavioral health assessment to create improved outcomes for your residents and program participants.

Michael Goldsmith, LCSW, Director of Behavioral Health Services, Behavioral Care Solutions LLC, Novi, Mich.

11 – 11:30 a.m.

Break

11:30 a.m. – 12:30 p.m.

CONCURRENT SESSIONS

V1901 – Nurse Leaders: Improving Resident Care through Peer-to Peer Learning (AL, CC; Peer Genius)

- Identify ways to improve clinical process and resident care.
- Hear from the 2024 Nurse Leadership Program teams about their project results and lessons learned.
- Discuss strategies that can be used within your organization.

Dr. Kari Everson, RN, LNHA, LALD, Vice President of Clinical Services, LeadingAge Minnesota, Minneapolis and President, Evercare Aging Services Consulting, St. Paul; and Nurse Leadership Program Project Teams

V1902 – What's Your Story: A Narrative Approach to End-of-Life Care (AL, CC, HCBS; Deep Dive)

- Explore the need for people to be authors of their own life narrative to achieve a sense of spiritual peace in the midst of their disease process.
- Identify practical tools care providers can use in aiding people to move forward in this life scripting project.
- Discuss non-pharmaceutical therapies to alleviate end-of-life existential suffering.

Fred Grewe, DMin, Chaplain-Retired, Meditations 4 Misfits, Medford, Ore.

V1903 – Unraveling the Mystery of the SNF Final Rule 2025 (CC)

- Describe three leadership strategies to address the challenges of the final rule.
- Discuss the changes to Non-Therapy Ancillary Services and the Patient-Driven Payment Model.
- Examine the changes for FY 2025 to the Quality Reporting Program and Value-Based Purchasing Group discussions.

Speaker to be announced

INSTITUTE FEE STRUCTURE - HELPFUL TIPS

ORGANIZATION/SITE FEE

Each building/site/service entity on a single campus must register and pay a separate fee.

ONE FLAT FEE



**ALL STAFF
AT A SINGLE
LOCATION/ENTITY**

NON-EXHIBITING VENDORS

Business Partners and non-exhibiting vendors fall under the organizational fee structure and are not eligible for the individual conference fee.

ONE FLAT FEE



**ALL STAFF
FROM
COMPANY**

INDIVIDUAL FEE

Individual fees apply if only one employee of a provider site/entity is attending the conference.

ONE FLAT FEE



BENEFITS OF ATTENDING THE INSTITUTE

- Organization/service site registration fee includes attendance for any/all staff at your site.
- All staff from registered organizations receive access to in-person and/or virtual content.
- Earn up to 10 CEUs by participating in the in-person Institute.
- Register for an in-person Tuesday Intensive and earn 3-5 more CEUs.
- Earn up to 29 CEUs by viewing all the virtual Institute sessions live and/or on-demand.

See page 53 for registration fees details.

**FEE INCLUDES
IN-PERSON
AND/OR
VIRTUAL
CONFERENCE**

REGISTRATION FEES

SAVE \$100 by registering on or before Jan. 8, 2025.

ORGANIZATIONAL REGISTRATION FEES

One flat fee includes in-person and/or virtual conference participation for all staff at a single location/entity. Fees listed are the regular rate. SAVE \$100 by registering on or before Jan. 8, 2025. ADD \$100 if registering on or after Feb. 5, 2025.

CARE CENTERS

Number of Care Center Beds	Metro*	Greater MN
1-40	\$1,135	\$930
41-60	\$1,500	\$1,040
61-100	\$2,030	\$1,500
101-150	\$2,250	\$1,680
151+	\$2,360	\$1,720

Prospective member Care Center fee is \$2,515
*Metro area includes Anoka, Carver, Dakota, Hennepin, Ramsey, Scott, and Washington counties.

HOUSING

Number of Housing Units	
1-20	\$655
21-40	\$755
41-70	\$855
71+	\$970

Prospective member Housing fee is \$1,135

ADULT DAY CENTERS

\$330
Prospective member Adult Day Center fee is \$515

ASSOCIATE COMPANIES*

\$680
Prospective member Associate fee is \$950
**Includes home care, hospice, and other community-based services.*

CORPORATE/ MANAGEMENT OFFICES

Number of Owned and Managed Sites in MN

1-5	\$750
6-10	\$1,010
11+	\$1,250

Prospective member Corporate Office fee is \$1,420

NON-EXHIBITING VENDORS*

Business Partner \$1,070
Prospective Business Partner \$1,500
**Non-exhibiting vendors fall under the organizational fee structure and are not eligible for the individual registration fee.*

INDIVIDUAL REGISTRATION FEES

All fees are listed per-person. \$100 discount/late fee does not apply. Individual rates do not apply to non-exhibiting vendors.

CONFERENCE REGISTRATION

Provider/Associate Member (full conference)*	\$440
Prospective Provider (full conference)*	\$620
Full-time Student/Faculty Member	\$40
State/Government Agency Staff	\$110
Expo Only One Day Pass – Provider	\$40
Expo Only One Day Pass – Vendor	\$200

**Individual fees are for one person only from an organization/entity to attend. If registering more than one person, use the organizational fees above.*

SPECIAL EVENTS

(per person fees)	Member/Prospective Member
Pre-Conference A (Feb. 11)	\$90/125
Pre-Conference B (Feb. 11)	\$170/240
Pre-Conference C (Feb. 11)	\$135/190
Pre-Conference D (Feb. 11)	\$135/190

REGISTER

Registration questions?
Contact education@leadingagemn.org.

Not a member? Join today and save! Contact Jessica Lacher at jlacher@leadingagemn.org to explore the value of membership.