



Virtual

ANNUAL MEETING & LEADERSHIP FORUM

Sept. 22-24, Oct. 5, 2021

LeadingAge[®]
Minnesota

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TOGETHER** 

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These fine organizations are dedicated partners whose financial support helps provide quality programs and resources to our members.

Through these unprecedented times, our annual sponsors have continued their steadfast support of our collective work. They have met myriad challenges with industry expertise, innovative solutions, flexibility, and a genuine desire to help our members serve seniors with excellence and dignity.

For all you do – thank you. We truly are Better Together.



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WELCOME

Welcome to LeadingAge Minnesota's Virtual Annual Meeting & Leadership Forum!

We have been through a collective experience that has challenged and forever changed us. But we are resilient, hopeful, and ready to move Forward Together.

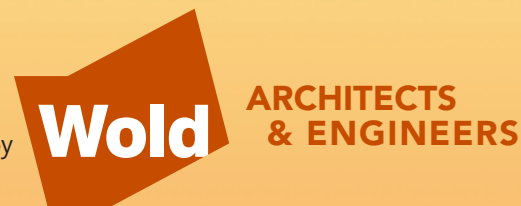
Annual Meeting is where our leaders have gathered over the decades to build community, assess our challenges, and formulate strategies for moving forward.

As much as we were all looking forward to being in person this year, we are converting our Annual Meeting to a virtual event. Session content will be available for on-demand viewing and earning CEUs through November 2021 for all registered participants.

Join us in September and October.



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SCHEDULE OF EVENTS

Wednesday, September 22

8:15 – 9:30 a.m.

Welcome, Awards, and Opening Keynote *sponsored by* **PIPER | SANDLER**

Fast Forward: The Emerging Age of Reimagination, Redesign, and Regeneration

A great reset is now upon us. The rules of business are being rewritten by an extraordinary cadre of individuals, enterprises, and organizations willing to rethink long-held assumptions, reinvent products and processes, and reestablish new and innovative ways to re-engage with both their staff teams and their communities.

What does this mean for our field? How has the pandemic changed the business and services landscape, and how can we leverage this unique time to reimagine and redesign our service to older adults?

In this refreshing and insightful keynote presentation, global futurist and best-selling author Jack Uldrich will share key insights from his forthcoming book, “The Rise of Generation RE.” He demonstrates how as leaders we can embrace and leverage the principles and mindset of “Generation RE” in order to reframe problems into opportunities, reconnect with our staff and customers at a deeper, more meaningful level, redesign our business around the things that matter most, and reimagine a better, bolder, and more beautiful future for seniors in Minnesota.

Jack Uldrich is a global futurist, speaker, and author of 12 books, including several award-winning best sellers. He is considered an authority on technology, change management, and leadership; and is an ongoing contributor on emerging technologies and future trends for several publications. He is a former naval intelligence officer and Defense Department official; and previously served as director of the Minnesota Office of Strategic and Long-Range Planning. His next book, “The Rise of Generation RE” will be released by Greenleaf Books in 2022.

9:30 – 9:45 a.m.

Break



SCHEDULE OF EVENTS

Wednesday, September 22, *cont'd.*

9:45 – 10:45 a.m.

General Session

Recovery and Reinvention Strategies: Leader to Leader Panel

Back by popular demand, panelists will talk candidly about their experiences leading their organizations through the last 16 months – the challenges and opportunities they faced and what they've learned. Gain insights you can use to move your organization forward.

Mark Anderson, President and CEO, Knute Nelson, Alexandria; Jim Bettendorf, President and CEO, Vista Prairie Communities, Brooklyn Park; Dan Lindh, President and CEO, Presbyterian Homes and Services, Roseville; and Penny Solberg, President and CEO, Spring Valley Living, Spring Valley

10:45 – 11 a.m.

Break

11 a.m. – Noon

General Session

Workforce Town Hall Forum

One of the most critical issues facing providers is the ever-deepening workforce shortage impacting every category of job in their organizations, but most especially frontline caregivers. The underlying forces contributing to this shortage are well known and documented, but the pandemic has significantly exacerbated the strain this crisis is putting on providers of older adult services. In this Town Hall Forum, Minnesota DHS and DEED Commissioners will discuss short-and long-term action steps and engage providers in identifying solutions that can make a real difference.

Jodi Harpstead, Commissioner, Minnesota Department of Human Services, St. Paul; and Lorrie Janatopoulo, Director of CareerForce, Minnesota Department of Employment and Economic Development, St. Paul

Noon – 12:45 p.m.

Break

SCHEDULE OF EVENTS



Wednesday, September 22, *cont'd.*

12:45 – 1:45 p.m.

CONCURRENT SESSIONS

#1 – **Business as Unusual: How to Future-Proof Your Business in Transformational Times**

- Discuss how COVID transformed the world of tomorrow and why it will continue to accelerate many of the trends already at work prior to the pandemic.
- Explore how to leverage unconventional techniques to propel our work forward in these transformational times, including: embracing uncertainty, learning to unlearn, listening to unconventional voices, and questioning unquestionable assumptions.
- Apply these principles to our work to emerge from the pandemic ready to transform the way we serve Minnesota's older adults.

Jack Uldrich, Futurist and Author

#2 – **Skilled Nursing Facility Surveys: Trends and Updates from MDH**

- Review trends in care center licensing/certification surveys, complaint surveys, and focused infection control surveys, and identify opportunities to remain in compliance.
- Hear about current Licensure and Certification Program updates.
- Explore other timely topics related care center licensing and certification.

Martha Burton Santibáñez, MPA Division Director, Health Regulation Division, Minnesota Department of Health, St. Paul

#3 – **Opportunities in the Home and Community-Based Services Landscape**

- Understand the impact changing reimbursement streams and evolving consumer preferences have had on the demand for in-home care.
- Identify potential growth opportunities for your organization to help meet the needs of your community.
- Learn how you can prepare to expand into different service lines like home health, home care, and hospice.
- Take home best practices and guidance for the financial and operational oversight of the HCBS business lines your organization might want to adopt.

Mark Landreville, Managing Director, Ziegler Investment Banking and Senior Living, Minneapolis; Katie Perry, Chief Development & Strategy Officer and Senior Vice President, Knute Nelson, Alexandria; and Jon Riewer, President and CEO, Eventide, Moorhead

1:45 p.m.

Adjourn for the Day

SCHEDULE OF EVENTS

Thursday, September 23

8 – 8:35 a.m.

Annual Business Meeting

All members in attendance are requested to attend the association's annual business meeting. The business meeting is an essential function of association governance and as a member, you play an important role. Members will receive important information on the financial condition of the association, elect honorary members, and vote on key governance changes. All members are welcome; however only voting members are eligible to vote.

8:35 – 8:45 a.m.

Break

8:45 – 9 a.m.

Message from the CEO

*Gayle Kvenvold, President & CEO
LeadingAge Minnesota, St. Paul*



9 – 10 a.m.

General Session

Seniors Housing and Care Market Trends: From the There-and-Then to the Here-and-Now

- Discover the impact of COVID-19 on the pace of senior housing move-in and move-out rates, changes in occupancy, and other findings from NIC's Executive Survey Insights.
- Identify the current market fundamentals for seniors housing and care including occupancy, inventory growth, and demand measures.
- Examine the disruption in the status quo and how the pandemic is leading to the transformation of senior housing and care.
- Explore key opportunities and challenges that will impact short-term and long-term business decisions.

Lana Peck, Senior Principal, National Investment Center (NIC), Annapolis, Md.

10 – 10:15 a.m.

Break

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SCHEDULE OF EVENTS



Thursday, September 23, *cont'd.*

10:15 – 11:15 a.m.

CONCURRENT SESSIONS

#4 – A Leader's Guide to Creating an Inclusive Organizational Culture

- Understand that creating an inclusive organizational culture begins at the top with you teaching other leaders and managers what their roles are in this effort.
- Explore practical and low-stress approaches that will help you engage in the courageous conversations and messaging that are an essential part of building a welcoming and inclusive organizational culture.
- Describe the key inclusion skills that employees will need to develop and the positive outcomes that will benefit them and the organization.
- Consider the timing of your DEI efforts so that you can create a roadmap for others. (Hint: move slow to go fast.)

Amy S. Tolbert PhD, CSP, Principal, ECCO International, St. Paul

#5 – How an Enterprise View of Strategy and Risk Leads to Better Decision-Making, Part 1: The Fundamentals (See Session #8 for Part 2)

- Recognize the importance of looking at risk management with a strategic lens to identify how a given risk may create exposure or opportunity for your organization.
- Understand the impact of risk across the dimensions of operational, financial, human capital, technology, legal/regulatory, or strategic; and how to manage or mitigate them for timely and better decision making.
- Describe how risks may represent an exposure gap to be closed, an opportunity gap to be leveraged, or a “watch list” item for closer monitoring.
- Identify when an action plan may be needed to support better risk decision making or drive better risk outcomes.

William S. Bojan Jr., Founder, Integrated Governance Solutions, Eden Prairie

#6 – Re-Setting and Re-Sizing Your Operations for a New Reality

- Recognize that success in the new reality shaped by the pandemic means that all operational areas must be evaluated in order to be reinvented to meet community needs in the short and long term.
- Understand the correlation between a leader's “stuck” mindset and the ability to think creatively and move quickly when initiating necessary organizational changes.
- Know that some of those changes might mean re-sizing or right-sizing the number of beds or units; or discontinuing under-utilized services or programs.
- Identify key strategies and ideas for realigning operations for future financial success and improved quality.

Erin Shvetzoff Hennessey, MA, CPG, NHA, Chief Executive Officer, Health Dimensions Group, Hopkins

11:15 a.m. – Noon

Break

SCHEDULE OF EVENTS



Thursday, September 23, *cont'd.*

Noon – 1 p.m.

CONCURRENT SESSIONS

#7 – Leader to Leader Panel: Freestanding Rural Innovations

- Appreciate how the expansion of services and creative programming revitalized an older adult services provider in a rural setting.
- Hear how one rural provider is meeting broader community needs for childcare and catering services, while supporting their own.
- Understand how a campus with a continuum of older adult services has become a “one-stop-shop” in their community.
- Consider the experiences of an organization providing in-home assistive technology in 17 counties.
- Gain important insights and ideas you can use to provide innovative services to meet community needs.

Deb Barnes, CEO/Administrator, Lakeview Methodist Health Care, Fairmont; Mark Bertilrud, Executive Director, Warroad Senior Living Center, Warroad; Michelle Haefner, CEO, Bethesda, Willmar; and Nathan Johnson, CEO, PioneerCare, Fergus Falls

#8 – How an Enterprise View of Strategy and Risk Leads to Better Decision-Making, Part 2: Lessons Learned from the Field (Continued from Session #5)

- Gain important insights and lessons learned from organizations embarking on this approach, including what impact it has had on their strategic planning process.
- Explore best practices about what level of risk detail is best provided to boards and how to leverage risk dashboards.
- Learn how taking a “risk lens” approach to your organization’s strategy can help support more timely and accepted strategic course corrections as/if needed.
- Understand how maintaining a strategic risk profile and organizational dashboard drives more timely and cost-effective actions that help achieve success.

William S. Bojan Jr., Founder, Integrated Governance Solutions, Eden Prairie; Erin Shvetzoff Hennessey, MA, CPG, NHA, Chief Executive Officer, Health Dimensions Group, Hopkins; and Carol Raw, President and CEO, St. Francis Health Services of Morris

#9 – Hot Topics in Assisted Living

- Hear about the change in EW rates resulting from federal FMAP funds the state has approved.
- Gain important insights from the new Assisted Living Licensure surveys conducted since implementation on August 1, 2021.
- Evaluate the progress of your organization’s compliance with the new licensure requirements and identify what, if any, changes need to be made in light of current citation trends.

Kari Everson, RN, PHN, BSN, MSN, MHA, LNHA, LALD, Vice President of Clinical Services & Nurse Consultant, LeadingAge Minnesota, St. Paul, and President and Consultant, Euvoia Senior Care Consulting, Woodbury; and Peter Spuit, Home and Community Based Services Consultant, Aging and Adult Services Division, Minnesota Department of Human Services, St. Paul

1 p.m.

Adjourn for the Day

SCHEDULE OF EVENTS

Friday, September 24 Co-hosted with

8:30 – 9:30 a.m.



Minnesota Hospital Association

Minnesota's Demographic Future and Its Impact on Health Care and Older Adult Services

State Demographer Susan Brower shares information and insights about broad demographic trends playing out in the Land of 10,000 Lakes and their implications for health care and older adult services. Recognize how higher-order skills and education are increasingly the key that allows workers to unlock job prospects and evaluate what this means for your recruitment and retention efforts. Brower examines how Minnesota's aging trend and increasing diversity will impact the areas of health, disability, volunteerism, the state budget, and the future labor force.

Susan Brower is the Minnesota State Demographer and directs the MN State Demographic Center. Her work applies an understanding of demographic trends to changes in a range of areas including the state's economy and workforce, education, health, immigration, and rural population changes. Susan holds a Ph.D. in sociology from the University of Michigan, and a master's degree in public policy from Humphrey School of Public Affairs at the University of Minnesota.



9:30 – 9:45 a.m.

Break

9:45 – 10:45 a.m.

Learning from Influential Leaders

Titans, artists, coaches, leaders, and icons. Time magazine refers to them each year as influential people. Influential leaders build upon their integrity and mold a culture of values and service. Who are the influential leaders in your life that inspire you to become a better person? A better leader?

In this entertaining and inspirational keynote, Joe Nayquonabe showcases the powerful leaders he admires for their ability to not only shape history, but truly make an impact on the world. He illustrates how their extraordinary impact is relatable to today's workforce and how you can heed their words of advice to make an impact. Be inspired to create your own roster of influential leaders that help you become a better person and leader.

Joe Nayquonabe Jr. is an American Indian business professional that has spent his career reimagining and reinventing how American Indian tribal economies grow and prosper. He spent over a decade as a marketing executive growing the Grand Casino brand before becoming CEO of the Mille Lacs Band's Corporate Commission where he created several companies including Mille Lacs Corporate Ventures, which manages the business portfolio of the Mille Lacs Band. He also serves on several boards including Mille Lacs Health System.



10:45 a.m.

Adjourn for the Day

SCHEDULE OF EVENTS

Tuesday, October 5

8:30 – 9:30 a.m.

CONCURRENT SESSIONS

#10 – Hot Topics in Employment Law

- Discuss options for vaccine policies and if they should be mandatory or permissive in your setting.
- Know what the law requires for people who cannot get vaccinated, the required exemption process, and how to implement it.
- Examine leave policies for employees who have a particular susceptibility or family members who do.
- Understand what disciplinary actions you can or cannot take for non-compliance with policies like mask wearing, and how to address concerns from outside parties.
- Describe accommodations that may be necessary under the ADA and consider what is reasonable, what creates undue hardship, and what is considered a direct threat.

Penny Phillips, Attorney, Felhaber Larson, Minneapolis

#11 – Leader Innovations Panel: Emerging Value-Based Payment Service Delivery Options

- Hear about Knute Nelson's two-pronged approach to population health – one as an overall organizational strategy, and the other through a grant funded Connected Communities for Healthy Aging project.
- Become familiar with Cassia's partnership in owning a mobile geriatric medical practice which is positioning the organization to participate in value-based reimbursement models.
- Discover a population health model being developed by LifeSprk with the goal of keeping people well, utilizing data, and moving toward value-based services.
- Evaluate your organization's potential to pursue value-based payment service delivery options.

Bob Dahl, President and CEO, Cassia, Edina; Cathy Luring, APRN, CNP, Vice President, Lifesprk Health; and Lindsey Sand, LHSE, NHA, Vice President of Population Health, Knute Nelson, Alexandria; and Cathy Luring, APRN, CNP, Vice President, Lifesprk Health, LifeSprk, St. Louis Park

9:30 – 9:45 a.m.

Break

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SCHEDULE OF EVENTS

Tuesday, October 5, *cont'd.*

9:45 – 10:45 a.m.

CONCURRENT SESSIONS

#12 – **Emerging COVID Liability Issues: Assessing and Mitigating Risk**

- Review the early days of the pandemic and the assumptions and official guidance under which older adult services providers operated in good faith, which now have exposed them to liability claims.
- Describe the range of liability issues that might arise for both civil and criminal claims, as well as federal and state regulatory compliance matters.
- Discuss COVID related risk management strategies and options.

Rebecca Coffin, Attorney/Partner, Voigt, Rodè, Boxeth & Coffin LLC, St. Paul; Pete Gregory, Co-General Counsel, Presbyterian Homes and Services, Roseville; and Jesse A. Berg, Attorney, Lathrop GPM LLP, Minneapolis

#13 – **Skilled Nursing Facility Reimbursement: How COVID, VBR, and New Legislation will Impact Your Rates**

- Receive the latest information on the cessation of COVID 12A.10 reimbursement.
- Discuss the interactions of federal funds and future rates.
- Know how VBR rates will be calculated for 2022 and 2023.
- Learn about new moratorium funding and other 2021 special session updates.

Kimberly Brenne, Audit Director, and Valerie Cooke, Nursing Facility Rates and Policy Division Director, Minnesota Department of Human Services, St. Paul

#14 – **Meeting the Future Demand for Assisted Living**

- Hear about the latest development trends in senior housing.
- Recognize the impact the Assisted Living Licensure implementation has had on senior housing development.
- Understand how this change will impact existing buildings.
- Explore creative ideas to meet the demographic need for senior living settings.

Jill Nokleby Kaiser, Director of Housing Development, Ebenezer, Edina; and Jamie Korzan, Vice President of Investment Relations, Oppidan, Excelsior

10:45 – 11 a.m.

Break

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SCHEDULE OF EVENTS



Tuesday, October 5, *cont'd.*

11 a.m. – Noon

CONCURRENT SESSIONS

#15 – **Pandemic-Driven Posttraumatic Growth for Organizations**

- Recognize your important leadership responsibility to assess how your organization has been affected by the trauma of the pandemic and what can be learned from the experience.
- Identify individual or organizational role models that have grown through adversity to show growth is possible and as a source of inspiration.
- Learn to view the pandemic as both a trauma with consequences as well as an opportunity for reinventing or improving the status quo.
- Evaluate how this experience may have served to connect individuals or organizations to humanity and the broader society, to provide clarity, and foster altruistic solutions.

Catherine R. Johnson, PsyD LP, Licensed Psychologist, Associated Clinic of Psychology, Minneapolis

#16 – **Exploring the Path to Financial Stability in a Changing Environment**

- Assess internal and external risk factors impacting the financial stability of senior living organizations.
- Explore and model the key financial and operational strategies necessary to obtain financial stability.
- Understand how leveraging a strategic plan will guide your organization's future.

Kris Jacobson, LHNA, LALD, MBA, Healthcare Consulting Director; Tyler Swenson, CPA, Healthcare Principal; and Matt Wocken, CPA, Healthcare Principal, CliftonLarsonAllen LLP, Minneapolis

#17 – **Employee Benefits That Make a Difference**

- Discuss the upsides and downsides to having housing as an employee benefit.
- Consider a novel and creative approach to address employee childcare needs.
- Understand the positive correlation between staff retention and a revised short-term leave policy.

Angela Brown, Chief Human Resources Officer, Cassia, Edina; Melissa Schneider, Administrator, Episcopal Church Home, St. Paul; and Sarah Beatty, Human Resources Business Partner, LifeSprk, St. Louis Park

Noon – 12:30 p.m.

Break

12:30 – 1:30 p.m.

Workforce Meetup Group

Grab your lunch and pop into the Workforce Meetup Group to meet awesome new colleagues, share ideas and discuss Annual Meeting workforce sessions. CEUs are not available for this informal learning opportunity.

Facilitator: Jenna Kellerman, Director of Workforce Solutions, LeadingAge Minnesota, St. Paul

1:30 p.m.

Conference Adjourns

CONFERENCE INFORMATION

REGISTER HERE

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. 17, 2021. No refund for cancellations made after the deadline or for no-shows.

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. The association business meeting does not qualify for CEUs. For further information, contact Heidi Simpson hsimpson@leadingagmn.org.

Questions? Contact [Ashley Rogers](#)

UPCOMING EVENTS

- Quality and Patient Safety Conference – Oct. 13-14
- LeadingAge National in Atlanta – Oct. 24-27
- Minnesota Night in Atlanta – Oct. 25
- Connect Conference – bringing together senior housing, assisted living, and home care – Oct. 27-28

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