

# Assisted Living Conference

Aug. 13–14, 2025

Heritage Center of Brooklyn Center

*LeadingAge*<sup>®</sup>  
Minnesota





# WELCOME!

Make plans to join us August 13–14 for LeadingAge Minnesota's Assisted Living Conference — designed with your day-to-day challenges in mind. This year's event delivers targeted training, essential updates, and practical tools to help you meet state requirements and provide exceptional care for your residents.

Explore products and services in our exhibit hall, recharge with peers during built-in networking breaks, and enjoy a fun midweek happy hour.

**Get ready for two meaningful days filled with fresh insights, valuable resources, and connection.**



**We can't wait to see you there!**

## Suggested Audience

Assisted Living Directors, Administrators, Clinical Nurse Supervisors and Nurse Managers, and Home Care or Assisted Living Staff

*\*Recommended Small Provider Track – Sessions are applicable to all Assisted Living communities and highly recommend for small providers.*

## Conference highlights

LALDs  
earn up to 10  
CEUs for  
re-licensure

Nursing and  
Social Work  
CEUs  
available

44 vendor  
displays  
highlighting  
products and  
services

Wednesday  
evening casual  
happy hour

The  
Assisted Living  
Conference  
is sponsored by



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# 2025 LeadingAge Minnesota Annual Sponsors

With deep gratitude we recognize our Annual Sponsors whose unwavering commitment to our members and financial support to LeadingAge Minnesota help provide quality programs and resources throughout the year.

Please look to them as you make decisions about purchasing products and services to support your business operations.

**For all you do – thank you. We truly are better together.**



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Wipfli LLP  
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# VISIT THE VENDOR DISPLAYS

Advanced Health Institute  
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River Oaks of Minnesota  
Sterling Long Term Care Pharmacy  
Thrifty White Partners in Care  
Triniti Home Health & Hospice

44 product  
and service  
options for  
you to explore

## Display Hours

Wednesday, Aug. 13  
10:15 – 10:45 a.m.  
and 1:45 – 2:15 p.m.

Thursday, Aug. 14  
10:45 – 11:15 a.m.  
and 2:15 – 2:45 p.m.

Here is a sneak  
peek of exhibitors  
that have been  
confirmed as of  
June 10, 2025.

## RESOURCES AVAILABLE FOR PURCHASE



### THE ESSENTIAL GUIDE - ASSISTED LIVING IN MINNESOTA

Updated in Winter 2024. The guide covers regulations and operations (volume 1) and policies, procedures, and self-audit tools (volume 2).

### LICENSED ASSISTED LIVING DIRECTOR TRAINING

This on-demand virtual coursework meets the MN-BELTSS criteria for licensure as an Assisted Living Director in MN.



## FREE MEMBER RESOURCES

### QUEST REPORT

A quarterly analytic resource for members focused on key trends in the senior care sector including Assisted Living. The information is intended as a general guide that may aid decision-making, policy development, and resource allocation.

### DATA PORTAL

The data portal gives members access to data tracking and vital benchmarking data to facilitate data-driven decisions. Data for workforce, compensation, financial conditions, and assisted living quality are available.



### EXPERT SUPPORT

You have questions. Our experts have answer. For questions about assisted living contact Bobbie Guidry, Vice President of Assisted Living, Housing, and Adult Day Services at [bguidry@leadingagemn.org](mailto:bguidry@leadingagemn.org).

## FREE COMMUNITY RESOURCE



### CARING CAREERS START HERE

Help job seekers understand all your organization has to offer. Update your Employer Match profile by sharing what makes your community unique.



# SCHEDULE OF EVENTS

8 – 9 a.m. **Registration and Continental Breakfast** Sponsored by **PDDN**

Passion for Dining and Nutrition

9 – 10:15 a.m. **WELCOME AND OPENING KEYNOTE PRESENTATION** Sponsored by **LeadingAge MN SOLUTIONS**

## See ME: The Power of Service in Person-Centered Care

The emerging market of Baby Boomers will think of themselves as customers! Is your staff ready to provide the service they expect? Providing person-centered care is today's gold standard. Where my rights, my agency, my ability to be as I am and live as I choose are foundational and my care is delivered with kindness, compassion, and grace.

**During this keynote you will learn how to:**

Create an environment in which residents experience joy.

Elevate the culture from the home to my home.

Bond employees to work together for a common purpose.

Learn to act with love no matter how you feel.



**Wednesday, Aug. 13**

**PETRA  
MARQUART**



Petra Marquart is a speaker, consultant, and author of the in-depth book, *The Power of Service: Keeping Customers for Life*. Customer service is Petra's passion and she believes that great service moves mountains, both on the job and off. It's about doing right, giving a hoot, and treating people well.

Petra Marquart is principal in See ME Inc., a Minnesota-based company dedicated to helping long-term-care communities deliver world-class service.

# Schedule of Events

Wednesday, Aug. 13

10:15 – 10:45 a.m. **Vendor Displays and Connection Break** Sponsored by 

10:45 – 11:45 a.m. **GENERAL SESSION** Sponsored by 

## **Minnesota Department of Health Assisted Living Updates**

- Identify policy changes from the 2025 Legislative Session that impact assisted living providers.
- Review the request, review, and decisions process for rules variance requests.
- Understand the latest OHFC report trends so you can avoid citations and maintain compliance.

*Matthew Heffron, JD, NREMT, State Rapid Response Operations Manager, and Daphne Ponds, RN, MSN, JD, State Executive Operations Manager | OHFC Director, Minnesota Department of Health, St. Paul*

11:45 a.m. – 12:45 p.m. **Networking Lunch** Sponsored by 

12:45 – 1:45 p.m. **CONCURRENT SESSIONS**

## **Session #1 – Behavior Management Best Practices for Community Living**

- Identify potential environmental triggers of behavioral symptoms in group settings and learn strategies to minimize them.
- Describe communication skills known to decrease the intensity and frequency of challenging behavioral symptoms.
- Take home strategies for involving the whole team in behavioral detective work to answer the critical question: “What is this person communicating?” and how to respond with non-pharmacologic therapies.

*Erin Bonitto, MS, ADC, Founder and Lead Coach, Gemini Consulting, Cold Spring*

## **Session #2 – Vulnerable Adult Reporting**

- Identify situations that warrant a report and the deadlines and information that need to be submitted during the reporting process.
- Summarize insights from current survey trends and failure to report citations.
- Discuss best practices on internal communication and compliance related to reporting and investigations.

*Christianna L. Finnern, Attorney and Shareholder, Winthrop & Weinstine, P.A., Minneapolis*

# Schedule of Events

Wednesday, Aug. 13

12:45 – 1:45 p.m.

Concurrent Sessions  
cont'd.

## **Session #3 – Food and Nutrition: Meeting the Guidelines for Older Adults** \*Recommended Small Provider Track

- Review the US dietary recommendations for older adults with a focus on nutrients that are typically underconsumed by this age group.
- Discover resources available to assist with planning meals including MyPlate.
- Explore simple strategies to make food fun and healthy.

*Dawn Nickleson, CDM, CFPP, Pastry Chef, Owner, Passion for Dining and Nutrition, Cottage Grove*

1:45 – 2:15 p.m.

## **Vendor Displays and Connection Break** Sponsored by



2:15 – 3:15 p.m.

## **CONCURRENT SESSIONS**

### **Session #4 – Activity Assessments: A Road Map to Quality Programming**

- Identify key programming elements outlined in assisted living activity regulations.
- Define essential activity assessment areas that contribute to effective and engaging programming.
- Discover innovative activity ideas and valuable resources to enhance programming efforts.

*Julie Reginek, M.S./A.C.C., Instructor, Riverview College, Hutchinson*

### **Session #5 – Reelin' in a Keeper: Recruitment and Retention Insights**

- Discover effective 'bait' and 'lures' for attracting top talent.
- Identify the key elements of a thriving workplace culture that ensures employees are 'keepers' and stay committed, including culture, benefits, and growth opportunities.
- Discuss how increasing team satisfaction and turning employees into "keepers" can boost overall community performance.

*Laura Bourdykin, Director of Managed Community Marketing, Sarah Friede, Senior Vice President of Recruitment Services, Barbara Klick, Executive Vice President of Quality, Alex Knight, LNHA, Senior Director of Recruitment and Placement Services, and Alex Witts (Moderator), Senior Graphic Designer, Health Dimensions Group, Hopkins*

### **Session #6 – Landlord-Tenant Laws and Reasonable Accommodations** \*Recommended Small Provider Track

- Understand the intersection of Landlord-Tenant Law and assisted living regulations.
- Recognize the legal requirements and best practices for providing reasonable accommodations.
- Discuss case study examples of accommodations that balance resident rights and provider responsibilities.

*Jenn Purrington, Deputy Director/Legal Director, Minnesota Disability Law Center, Mid-Minnesota Legal Aid, Minneapolis*

# Schedule of Events

Wednesday, Aug. 13

3:15 – 3:30 p.m. Break

3:30 – 4:30 p.m. CONCURRENT SESSIONS

## Session #7 – Ethical Decision Making in Providing Resident Services

- Identify common ethical dilemmas encountered in assisted living settings.
- Explore strategies for resolving them while honoring resident autonomy and dignity while maintaining regulatory and organizational compliance.
- Apply the principles of ethical decision making to real-life scenarios in resident care and service delivery.

*Speaker to be announced*

## Session #8 – Smoking and Substance Use - Legal and Regulatory Considerations

- Identify key legal issues around smoking and substance use in assisted living communities.
- Explore the balance of regulatory compliance, liability, and residents' rights.
- Discuss practical strategies for implementing and enforcing smoking and substance use policies, including documentation.

*Robert Rodé, Attorney/President, Rodé & Coffin, LLC, St. Paul*

## Session #9 – Waivered Services Programs in Assisted Living \*Recommended Small Provider Track

- Understand the waiver service programs in assisted living.
- Learn the components of the customized living tool and how to effectively optimize reimbursement.
- Discover ways to negotiate and establish partnerships with case managers.

*Julie Dietz, RN, PHN, VP of Community-Based Services, Senior Care Solutions Inc., Stillwater*

4:30 p.m. Adjourn for the Day

# HAPPY HOUR

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4:45 p.m.

Join us at Embassy Suites Lounge/Bar for happy hour! LeadingAge Minnesota invites all participants to stay a while longer and network. **The first drink is on us. We look forward to connecting with you!**



# Schedule of Events

Thursday, Aug. 14

8 – 8:30 a.m. **Continental Breakfast** Sponsored by 

8:30 – 9:30 a.m. **CONCURRENT SESSIONS**

**Session #10 – Licensed Assisted Living Directors MN-BELTSS Updates** \*Recommended Small Provider Track

- Identify important updates on licensee responsibilities and continuing education timelines.
- Discuss mentor information and resources.
- Explain the rule-making process, potential changes, and new fee structure.

*Steve Jobe, Executive Director, and Rebecca Bollig, Director of Assisted Living and Education, Board of Executives for Long-Term Services and Supports (BELTSS), St. Paul*

**Session #11 – Reducing Barriers to Entry Using Collaborative Partnerships**

- Understand how to integrate partnerships such as move managers, aging-specialized therapists, and financial planners into your sales process to better support leads.
- Leverage engagement and satisfaction data to personalize your sales approach and improve lead conversion.
- Apply corporate-inspired onboarding strategies to foster long-term resident satisfaction and retention.

*Rachelle Strasburg, Vice President of Sales and Marketing, Sholom, St. Louis Park*

9:30 – 9:45 a.m. **Break**

9:45 – 10:45 a.m. **CONCURRENT SESSIONS**

**Session #12 – Behavioral Health Protocols for Dementia Care**

- Explain the role of leadership rounding in fostering a culture of continuous quality improvement.
- Describe effective strategies to engage front-line staff in quality improvement efforts.
- Identify how shifting from blame to accountability improves learning and supports staff well-being.

*Julie Apold, PhD, Vice President of Quality and Performance Excellence, LeadingAge Minnesota, Minneapolis; and Cyndi Siders, RN, MSN, DFASHRM, CPHRM, CPPS, CWCA, Executive Consultant, Siders HealthCare Consulting, Grand Forks, N.D.*

# Schedule of Events

Thursday, Aug. 14

9:45 – 10:45 a.m.

Concurrent Sessions  
cont'd.

## Session #13 – Purpose Driven Behavioral Health Assessments

- 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.*

## Session #14 – Conducting Effective Fire Safety Drills in Assisted Living \*Recommended Small Provider Track

- Understand the fire safety regulations and requirements specific to drills in assisted living facilities.
- Identify how to plan, conduct, and document fire safety drills that reflect realistic scenarios and support resident safety.
- Discuss common challenges and practical solutions in engaging staff and residents during fire drill exercises.

*Bob Dehler, Program Manager for Assisted Living Engineering Services, Mortuary Science, and Health Occupations Programs, Minnesota Department of Health, St. Paul*

10:45 a.m. – 11:15 a.m.

**Vendor Displays and Connection Break** Sponsored by 

11:15 a.m. – 12:15 p.m.

## CONCURRENT SESSIONS

### Session #15 – Care at the End: Collaborative Approaches to Support Residents and Families

- Examine interdisciplinary strategies to deliver compassionate, person-centered end-of-life care.
- Identify effective communication techniques for engaging residents and families in meaningful end-of-life planning and decision-making.
- Explore partnership models with hospice, palliative care providers, and other stakeholders to enhance care at life's end.

*Shelli Bakken (Moderator), LSW, LALD, Director of Housing Operations and Customer Experience, LeadingAge Minnesota, Minneapolis; Jane Danner, Director of Operations, Our Lady of Peace, St. Paul; Kristina Wright-Peterson, Executive Director, Minnesota Network of Hospice & Palliative Care, Minneapolis; and Thomas Waknitz, Chaplain and Doula, Westwood Ridge II by Vivie, St. Paul*

### Session #16 – Clinical Nurse Supervisor's Role in Admissions and Preventing Terminations

- Explain the legal responsibilities of the clinical nurse supervisor in resident admissions, including required collaboration with the assisted living director.
- Demonstrate accurate and defensible documentation techniques expectations and protect resident rights.
- Apply assessment and service planning principles to determine the facility's ability to meet prospective residents' needs and prevent inappropriate admissions.

*Dr. Kari Everson, RN, LNHA, LALD, Vice-President of Clinical Services, LeadingAge Minnesota, Minneapolis and President, EverCare Aging Services Consulting, St. Paul*

# Schedule of Events

Thursday, Aug. 14

11:15 a.m. – 12:15 p.m.

Concurrent Sessions  
cont'd.

## **Session #17 – Emergency Preparedness - Best Practices for Plans and Compliance** \*Recommended Small Provider Track

- Describe the core elements of an emergency preparedness plan and how to tailor the plan to your setting.
- Discuss what surveyors are looking for in a plan and the compliance gaps they are finding.
- Identify tools and resources available to support assisted living providers with disaster planning and emergency preparedness.

*Kenneth Combs, CEM®, Regional Healthcare Preparedness Coordinator, and Emily Moilanen, MPH, Regional Healthcare Preparedness Coordinator, Metro Health and Medical Preparedness Coalition, St. Paul*

12:15 – 1:15 p.m.

## **Networking Lunch** Sponsored by

1:15 – 2:15 p.m.

## **CONCURRENT SESSIONS**

### **Session #18 – Maintaining Safe Spaces: Property Upkeep and Renovation** \*Recommended Small Provider Track

- Identify common building and property hazards in assisted living settings and how to conduct proactive facility assessments.
- Understand the regulatory requirements and permitting process for building repairs and renovations.
- Explore best practices for managing vendor contracts and project oversight to ensure safe and compliant maintenance and construction.

*Jeff Richardson, Director, Environmental Services, Benedictine, Fridley*

### **Session #19 – Who Signs Now? Navigating Contracts and Capacity**

- Identify the multiple authorities that arise in the provision of health care.
- Discern which authority applies to various situations.
- Mitigate provider risk while navigating various decision makers.

*Rebecca Coffin, Attorney and Partner, Rodè & Coffin, LLC, St. Paul*

### **Session #20 – Facing Losses and Embracing the Future with Residents and Families**

- Distinguish differences and overlaps of loss and grief response.
- Describe tools for supporting honest hopes even when facing major losses.
- Describe caring compassion in assisted living settings.

*Ted Bowman, MDiv, Educator, Author, Consultant, St. Paul*



# Schedule of Events

Thursday, Aug. 14

2:15 – 2:45 p.m.

**Vendor Displays and Connection Break** Sponsored by 

2:45 – 3:45 p.m.

## CONCURRENT SESSIONS

### Session #21 – Navigating the MDH Survey Process \*Recommended Small Provider Track

- Identify key components of the survey process including timelines, focus areas, and documentation.
- Describe strategies to ensure compliance and demonstrate readiness before, during, and after a survey.
- Discuss techniques for managing post-survey actions including exit conferences and post-survey follow-up with surveyors.

*Dr. Kari Everson, RN, LNHA, LALD, Vice-President of Clinical Services, LeadingAge Minnesota, Minneapolis and President, EverCare Aging Services Consulting, St. Paul*

### Session #22 – Managing Mental Illness and Effective De-escalation in Assisted Living

- Identify potentially volatile situations/causes for agitation and aggression considering common mental health issues that are present in assisted living residents.
- Review skills necessary to prevent agitation and aggression, and promote mental well being.
- Learn verbal and physical skills to effectively intervene for de-escalation of agitated or aggressive situations.

*Alyson VanAhn, PsyDLP, Licensed Psychologist, Associated Clinic of Psychology, Minneapolis*

### Session #23 – Navigating Background Studies in Aging Services

- Understand the background studies process for employees in aging services and best practices for maintaining compliance.
- Identify key regulatory requirements and recent updates impacting background studies in assisted living and customized care settings.
- Explore common challenges in background study compliance and strategies to address them effectively in day-to-day operations.

*Andrew N. Johnson, External Relations and Engagement Consultant, Office of Inspector General – Background Studies Division, Minnesota Department of Human Services, St. Paul; and Mark Schulz, Vice President of Policy and Regulatory Affairs, LeadingAge Minnesota, Minneapolis*

3:45 p.m.

**Conference Adjourns**

# GENERAL INFORMATION AND REGISTRATION



## LOCATION

Heritage Center of  
Brooklyn Center  
6155 Earle Brown Dr.  
Brooklyn Center,  
MN 55430



## FREE PARKING

The venue has ample  
onsite FREE parking.



## ACCOMMODATIONS

Embassy Suites Minneapolis-North  
(attached to the Heritage Center).  
Sleeping room block is held under  
“LeadingAge Minnesota” for the  
evenings of Aug. 12 and 13, 2025.

**Rate: \$179 per night** includes cooked to order breakfast  
and evening reception. **Call 763.560.2700 or book  
online <https://bit.ly/4kvOAK6>.** Room block expires  
on July 22, 2025. Cancellation deadline is 48 hours  
prior to arrival.

## CONTINUING EDUCATION CREDITS

### Minnesota Board of Executives for Long Term Services and Supports (MN-BELTSS)

The educational programming at this conference has  
been approved for a maximum of 10 clock hours for  
Minnesota licensed assisted living directors and  
licensed nursing home administrators.

### Minnesota Board of Nursing

Programming has been designed to meet the  
continuing education approval of the Minnesota Board  
of Nursing for a maximum of 10 contact hours.

### Minnesota Board of Social Work

LeadingAge Minnesota is an approved provider of  
continuing education.

### General CEUs

General certificates of attendance will be available.

## HANDOUTS

Participants will receive links to electronic handouts in the  
conference app before the event and are encouraged to print  
them in advance or download to view on a laptop or tablet.

## REGISTRATION DEADLINE AND CANCELLATION POLICY

**Register online by Aug. 7, 2025**

To receive a partial refund, all cancellations must be made  
in writing by Aug. 4, 2025, and are subject to a \$25 processing  
fee. No refund for no-shows, but substitutions for the full  
conference are welcome. LeadingAge Minnesota reserves  
the right to cancel this conference or any individual sessions.

## FOR FURTHER INFORMATION

Contact Olivia Scott, [oscott@leadingagemn.org](mailto:oscott@leadingagemn.org) for  
assistance or if your registration has not been confirmed.

## REGISTRATION FEES

### Early Bird Rate On or Before July 11

LeadingAge Minnesota Members	\$390
Prospective Members	\$550

### Regular Rate July 12 or Later

LeadingAge Minnesota Members	\$440
Prospective Members	\$600

The full conference registration may not  
be shared; each attendee must register  
individually and pay a registration fee.



Registration includes  
breakfast buffet, morning  
refreshments, lunch  
buffet, and afternoon  
refreshments.

**REGISTER  
HERE**