



2026 WALA ANNUAL CONFERENCE

# ENCORE!

Creating **MORE** Success



February 25-27, 2026  
Kalahari Resorts, Wisconsin Dells, WI



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event promotion sponsor



10 CEU available.  
NAB Credits  
applied for.

2026 WALA ANNUAL CONFERENCE

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## Schedule of Events

### Wednesday

11:00am	Pre-Event Registration and Lunch
12:00pm	Pre-Event: Addition by Subtraction: Letting Go of What's Holding You Back in Leadership
5:00pm	Opening Evening Reception + Trivia

### Thursday

7:30am	Registration and Exhibit Hall Open
8:15am	Opening Remarks and Intro of Initiative Bypassing Referral Agencies
9:00am	Keynote: The Encore Experience
10:00am	Break in Exhibit Hall
11:00am	Concurrent Breakout Sessions, Exhibitor l Board Networking
12:00pm	Lunch / Hero Awards / Exhibit Hall
1:30pm	Concurrent Breakout Sessions
2:30pm	Break in Exhibit Hall
3:30pm	Concurrent Breakout Sessions
5:00pm	Exhibitor Prize Drawing Reception with Cornhole Tournament

### Friday

8:30am	Registration and Light Breakfast
9:00am	Concurrent Breakout Sessions
10:15am	Concurrent Breakout Sessions
11:30am	Lunch, Closing Session with BAL Director, Ken Brotheridge, and WALA - PAC Raffle



## Additional Information

Kalahari Resorts Wisconsin Dells  
1305 Kalahari Dr, Baraboo, WI 53913

### Overnight Accommodations

WALA's room block is available and open at the Kalahari through January. Book your room through this [LINK](#)!

### Digital Conference Agenda

Utilize this page [LINK](#) for the most up to date information, session handouts, and session locations

# Thank you to our Exhibitors

Adrenaline Homes.....	Prime 1
Aegis Therapies .....	220
Aire-Master.....	501
ALEA Training & Consulting .....	307
ALIS.....	505
ALPS .....	600
Anthem Blue Cross Blue Shield.....	911
ASSA ABLOY .....	702
Bath Fitter .....	701
Bayland Buildings, Inc .....	706
Bluestone Physician Services.....	Prime 4
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Carefeed .....	403
ClearPath Connections .....	201
Consolidated Construction Company...	601
Curana Health .....	800
Davis Clinical Consulting.....	306
EasyShifts .....	Prime 3
ECP .....	Prime 6
Equip Training & Consulting .....	Prime 5
Further .....	404
Ganther Construction I Architecture....	809
Gordon Food Service.....	305
Greenfield Rehabilitation.....	821
GROTH Design Group .....	400
Guardian Pharmacy .....	704
Hayat LTC Pharmacy .....	Prime 8
Herzing University.....	707
Iconica .....	Prime 0
Kellanova.....	604
Kelmann Restoration .....	406
Lerdahl.....	Prime 7
LTC Rx Pharmacy .....	402
M3 Insurance .....	401
Magic Shields USA.....	Prime 9
Martin Bros Distributing .....	Prime 2
McCullough's LTC Pharmacy .....	208
Medication Management Partners .....	506
Midwest Mobile Wound Care .....	504
Moments Hospice .....	300
Morton LTC Pharmacy.....	214
Oak Medical.....	500
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# Thank you to our Sponsors

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# Thank you to our 2026 Annual Sponsors

WALA is grateful for their commitment!

## ELITE SPONSORS



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# WEDNESDAY FEBRUARY 25

## 12:00pm-4:30pm - Pre-Event

**Addition by Subtraction:  
Letting Go of What's Holding  
You Back in Leadership**

African 50



Kick off the event with this powerful, interactive workshop led by Bethany Clemenson, leadership coach and healthcare executive, as she leads us through a 4-hour workshop intensive on Addition by Subtraction. Discover how Creating MORE Success isn't about adding more -- it's about letting go. Learn how to release outdated habits, unnecessary responsibilities, and limiting beliefs, and walk away with a personalized 90-day Leadership Detox Plan for more clarity, energy, and impact.

*Thank you to our Sponsor:  
Davis Clinical Consulting*



## 5:00pm-8:00pm - Opening Evening Reception

African East/West Ballroom

*Thank you to our Sponsor:  
M3 Insurance*



Join us for networking and an opportunity to participate in pub style trivia. Whether you prefer to play individually, create a team, or simply enjoy the atmosphere -- this is a great opportunity to kick off the conference with a casual networking experience.



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Creating **MORE** Success

# THURSDAY FEBRUARY 26

## 7:30am - Registration and Exhibit Hall Open

African Ballroom

Thank you to our registration sponsor: **Iconica**

Thank you to our breakfast sponsor: **Kelmann Restoration**



## 8:15am - 9:00am - Opening Remarks and Intro of Initiative Bypassing Referral Agencies

Join President and CEO, Mike Pochowski, as he officially kicks off the event with a warm welcome and opening remarks. He'll be joined by Board Chair, Jill Kreider, to share key updates and highlight what's ahead for WALA. Included will be the announcement of **Where You Live Matters.org**, a partnership with WALA that will drive consumers directly to communities, bypassing third-party referral agencies.

African Ballroom

## 9:00am - 10:00am - Opening Keynote

### The Encore Experience

Gregory Offner

African Ballroom

Thank you to our sponsor:

**Reinhart Boerner Van Deuren S.C.**



When was the last time you went to a concert that was so good, you found yourself cheering "one more song" at the end? THAT is an Encore Experience. Why doesn't this exist in the workplace?

Imagine a workplace where...

- Your people take personal responsibility for their performance each day
- Work feels fun again
- Positive results are accelerating, and
- Your culture is so good, everyone wants to work there.

Your people are the center of the action. Creating an encore experience with your team builds a culture that has them excited about coming back every day. Creating an encore experience with your team is the foundation for Creating MORE Success. Are YOU ready for an encore?

*\*Note to those attending our opening keynote: Please be considerate of our speaker. If you wish to network with an exhibitor during this time, we ask that you network in the foyer outside of the main ballroom\**



# THURSDAY FEBRUARY 26

## 10:00am-11:00am Exhibit Hall Open

African Ballroom

Our event wouldn't be possible without the support of our exhibitors! Take this opportunity to connect with them, say thank you, and explore the tools, insights, and resources they offer to help you Create MORE Success.

## Featured Exhibitors



## WORKFORCE HUB

All Day

Front Foyer

Beyond the exhibit hall there are MORE resources available for you to explore. Take some time to visit our Workforce Hub in the front foyer to learn about these additional opportunities available to assist with your workforce needs.

# THURSDAY 11:00AM - 12:00PM

## CONCURRENT BREAKOUT SESSIONS

### Make Space for What Really Matters: Managing the Overwhelming To-Do List

*Brittany Meoska, Owner & Founder:  
Brittany Meoska Coaching, LLC*

African 10

Do you feel like you're always busy, constantly reacting to urgent demands while the bigger priorities—at work and in life—get pushed aside? This session introduces the “Big Rocks” framework—a powerful way to refocus your time and energy on what truly matters, instead of constantly spinning your wheels with tasks that leave you feeling depleted. Using the “Big Rocks” concept, you’ll identify where your time is currently going, what truly matters, and how to realign your energy toward what fills you up instead of drains you. You’ll leave with tools—and a simple framework—you can use immediately to feel more in control, more fulfilled, and less overwhelmed by the daily grind.

### Protecting Residents, Reducing Risk: Smarter Pre-Employment Screening in Assisted Living

*Gary Czaplewski,  
President: Capitoline Intel*

African 20

How compliance, efficiency, and technology safeguard your organization—and your residents. This presentation explores how modern, well-managed screening practices can transform your HR process from a burden into a strategic advantage. Simple technology platform can simplify compliance and streamlines operations through online BID forms, automated annual caregiver renewals, and FBI background checks when required by state or federal regulations. Attendees will discover how to build a compliant, technology-driven screening program that reduces administrative load and strengthens trust.

### Understanding RN & LPN Roles in Wisconsin Assisted Living Settings

*Mary Kate Friess, DNP, Director of Clinical Services; Sequoia Integrative Medical Services, Jodi Navis, RN, BSN, COO; Bay Harbor Assisted Living*

This session provides a concise overview of the RN and LPN roles within Wisconsin assisted living settings, highlighting scope of practice, regulatory expectations, and how nursing responsibilities vary across available assisted living models. Attendees will gain practical clarity on appropriate nurse utilization to support resident care, compliance, and quality outcomes.

African 30

### Filling Your Talent Pipeline Through Youth Apprenticeships

*Thomas Hermann, Career and Technical Education Coordinator: Southwest Milwaukee Consortium, Andrew Thompson, Community Experience Coordinator: Franklin Public Schools, and Emily Jasculca, Executive Director: Heritage Senior Living*

Across industries, workforce shortages are growing—especially in healthcare. Youth Apprenticeship (YA) has existed in Wisconsin since 1991 and is a proven way to fill these gaps by connecting young talent with real world experience. Employers gain motivated, trainable workers who are invested in the organization’s success. Students gain skills, experience and confidence in their chosen field. Come be a part of this interactive presentation and walk away with the action steps to add YA to onboard energetic staff, change your culture and ease your hiring and retention needs.

African 40

**THURSDAY 11:00AM - 12:00PM**

## CONCURRENT BREAKOUT SESSIONS

### **The Modern Move-In: Transforming Senior Living Admissions for a Better First Day**

*Loren Odom, National Sales Consultant: ECP & Pam Gaurkee, Director of Clinical Operations: Capri Communities*

**African 50**

In this session, ECP hosts senior living operators for a candid discussion on how collaboration between sales, marketing, and clinical teams transforms the resident experience. Panelists will share how the right tools, especially intake and CRM systems, help teams stay aligned, improve move-in transitions, and drive stronger outcomes. Attendees will leave with real-world insights on what worked before CRM adoption, what's working now, and how alignment fuels both resident satisfaction and organizational performance.

### **"Cracker Barrel" Open Panel Discussion with Assisted Living Activity Professionals**

*Lanna Luzar, Member: WRAP, Cindy Tewalt, Hotel Chair, Webmaster, NAAP Financial Director: WRAP & Deborah Smith, Community Life Director: WRAP*

**African 60**

During a "cracker-barrel" style meeting - casual, collaborative, and driven by everyone in the room and instead of a traditional presentation, this session creates a space for open conversation. All attendees, Activity Professionals and Administrators are encouraged to contribute, learn from each other, and connect through real experiences. Whether you're hoping to exchange best practices, discuss challenges you've faced in the field, or gain fresh perspectives on activity programming, this is the session for you. We'll cover topics relevant to activity professionals with an emphasis on practical tips, success stories, and lessons learned. Everyone's voice is valued, and it is our hope that all in attendance will not only walk away with new knowledge but with new connections and a sense of camaraderie with the Wisconsin Representatives of Activity Professionals. We're also excited to introduce a new opportunity for Activity Professionals working in Assisted Living Settings: The Assisted Living Enrichment Certification Course! Learn how this exciting new certification can support professional development, elevate engagement, and enhance enrichment programming in Assisted Living Communities.

### **Power of Persuasion**

*Robert Rogers, Regional Director of Business Development: Lifespark Senior Living*

**African 70**

In this engaging session, we'll explore six key principles of influence and how they can be applied within senior living communities to inspire genuine buy-in from staff, families, and prospects. Drawing from behavioral psychology and real-world experience, this presentation will provide practical strategies to strengthen leadership effectiveness, enhance team participation, and foster trust and collaboration. Attendees will leave with actionable tools to positively guide others toward shared goals.

### **Assisted Living Legal Updates**

*Robert Lightfoot, RN, Shareholder, Health Care & Corporate Practice Groups: Reinhart Boerner Van Deuren S.C.*

**African 80**

Will present regulatory update including information on "Top 10 Citations" for each licensed category of assisted living, regulatory appeal information, Video recording memo information, licensing information and updates, Medicaid information and updates, assisted living case law and updates, legislative updates as may be pertinent

# THURSDAY FEBRUARY 26

**12:00 - 1:30pm**  
**Lunch in Exhibit Hall**

*Thank you to our lunch sponsors:*

*Kelmann Restoration and  
Sequoia Integrative Medical Services*

**African Ballroom**



**12:30-1:00pm**  
**Hero Awards Ceremony**

*Thank you to our sponsor: SFM*

**African Ballroom**



**THURSDAY 1:30PM - 2:30PM**  
**CONCURRENT BREAKOUT SESSIONS**

## **Transforming Dementia Care Access in Assisted Living: The GUIDE Program in Action**

*Jill Kreider, President: Azura Memory Care  
and Nancy Berley, MD: Tembo Health*

**African 10**

As the number of residents living with dementia continues to grow, senior living operators face increasing pressure to deliver comprehensive care while managing limited clinical resources. This session will explore how Wisconsin-based Azura Memory Care partnered with Tembo Health to implement the GUIDE Dementia Program, a federally supported model designed to enhance dementia care access for residents on Traditional Medicare. Attendees will gain practical insights into how the GUIDE program: Expands access to dementia care at no cost to residents or communities. Integrates virtual wraparound clinical support and 24/7 urgent care within assisted living workflows. Empowers family caregivers through education, respite benefits, and social determinant screening tools (PRAPARE, PROMIS, and Caregiver Burden). Reduces emergency room utilization by up to 75% and improves care documentation and coordination. Through real-world results from Azura communities, participants will learn how to operationalize GUIDE in their own organizations—covering staff training, data sharing, and resident eligibility workflows—while aligning with their mission to deliver exceptional, person-centered dementia care.

# THURSDAY 1:30PM - 2:30PM

## CONCURRENT BREAKOUT SESSIONS

### From “Just a Job” to “I Belong Here”: Using Belonging in Onboarding to Stop Ghosting and Strengthen Retention

*Beth Ridley, Founder and CEO:  
Ridley Consulting Group*

African 20

New-hire ghosting is costly and disruptive. While it happens for many reasons, one of the strongest predictors of whether employees stay is whether they feel a sense of belonging early on. Ghosting often isn't about the job itself — it's about not feeling valued or connected from the start. When new hires experience belonging from day one, they build confidence, purpose, and motivation to stay. Without it, the work feels transactional and easier to leave. This session shares case studies from organizations that wove belonging into onboarding—from offer acceptance through day 90—and saw clear retention gains. You'll leave with simple, low-cost practices you can apply immediately to make onboarding a stronger driver of long-term loyalty.

### Tools for Successfully Implementing Standardized Dysphagia Diets

*Christy Edwards, Nutrition & Dining Strategists: Martin Bros Distributing*

African 30

Ready to streamline your transition to IDDSI guidelines? This session will equip you with actionable training methods and showcase essential products and resources that empower your team to confidently implement and elevate texture-modified diets within your community.

1. Understand the IDDSI framework and the driving factors behind standardized dysphagia diets.
2. Learn strategies for implementing standardized diet textures while involving ALL staff.
3. Identify key resources and specialized products to consistently serve IDDSI diet textures.

### Med Cart Mystery Escape Room - Pharmacy & Medication Cart Compliance

*Brian Bock, Director of Clinical Services:  
Hayat LTC Pharmacy & Chad Zuehlke, LTC Facility Manager: Hayat LTC Pharmacy*

African 40



Medication-management deficiencies remain among the most common citations in assisted-living surveys, with errors in labeling, MAR documentation, temperature monitoring, and controlled-substance handling placing residents at risk and threatening facility licensure. The Med Cart Mystery Escape Room - Pharmacy & Medication Cart Compliance addresses these challenges through a highly interactive, scenario-based training that transforms complex pharmacy and medication-cart requirements into an engaging, hands-on learning experience. Participants navigate realistic situations modeled after Wisconsin DHS 83, 88, and 89 regulations, working collaboratively to identify, correct, and prevent compliance issues. This session keeps attendees actively involved while reinforcing the practical skills essential for safe medication practices and strong regulatory readiness.

**THURSDAY 1:30PM - 2:30PM**

## CONCURRENT BREAKOUT SESSIONS

### **Ethics, Autonomy, and the Dignity of Risk: Part 1**

*Michael Gillette, PhD, Ethicist: Bioethical Services of Virginia, Inc.*

African 50

Part 1 of this highly interactive and case-based discussion will examine the interplay of personal autonomy and the duty to protect individuals from harm. We will begin by reviewing core ethical values concerning autonomy and protection from harm, and then move on to discuss appropriate and inappropriate interventions to mitigate risk. We will consider topics such as autonomy and the dignity of risk, protection of harm to self, protection of harm to others, and the safety and well-being of providers.

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### **Elevating Quality and Reducing Risk: Strategic QA and Risk Mitigation: Part 1**

*Sara Kekula, Director of Senior Living & Social Services Practices and Partner; M3 Insurance & Taylor Goodland, Client Executive; M3 Insurance*

African 60

The purpose of this session is to equip assisted living leaders with actionable strategies to strengthen Quality Assurance (QA) programs and reduce operational risk. The presentation will align with Wisconsin regulatory expectations and industry best practices, helping organizations proactively manage liability while improving resident outcomes. Attendees will leave with a better understanding of the components of a strong QA program, how to identify high-risk operational areas in assisted living, how to implement risk mitigation strategies, and how to align documentation and practices with DHS and survey expectations.

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### **Creating Stickiness: Building Magnetic Organizations that Attract and Keep the Right People**

*Kate Bertram, Author*

African 70

The senior living field is facing unprecedented workforce disruption—from frontline burnout and leadership turnover to intense competition for talent. This 60-minute session explores how organizations can respond not with quick fixes, but with lasting cultural transformation. Based on insights from the book *Creating Stickiness*, this session offers a practical roadmap to building an organizational culture that people don't want to leave. Attendees will explore the five foundational elements of “stickiness”—purpose, trust, belonging, growth, and recognition—and how to embed these into day-to-day operations, leadership practices, and employee experiences. Real-world case studies from senior living communities will be shared, alongside actionable tools that leaders can implement immediately. Whether you're facing staffing instability or seeking to re-energize your teams, this session equips you to turn culture into a competitive advantage.

**2:30 - 3:00pm - Break in Exhibit Hall**

# THURSDAY 3:30PM - 4:30PM

## CONCURRENT BREAKOUT SESSIONS

### Working Genius: Building Teams that Thrive

*Jeff Crain, Founder & Principal Consultant:  
Kairos Consulting*

African 10

Discover why one of today's fastest-growing workplace assessments is helping leaders turn everyday work into meaningful, energized collaboration. In this breakout, you'll learn a simple yet powerful framework that reveals where each person's strengths and energy come alive. Unlike traditional personality tests, Working Genius is a practical tool that boosts engagement, strengthens projects, improves hiring, and even transforms meetings. Through real-world examples and light, interactive exercises, you'll explore how the six "geniuses" of work—Wonder, Invention, Discernment, Galvanizing, Enablement, and Tenacity—shape momentum, collaboration, and results. You'll leave with clear insights and practical tools you can use immediately to help your team thrive.

### Where You Live Matters!

*Cindy Robinson, SVP Sales & Marketing  
and Stephanie Kucher, Sales Specialists:  
Capri Communities*

African 20

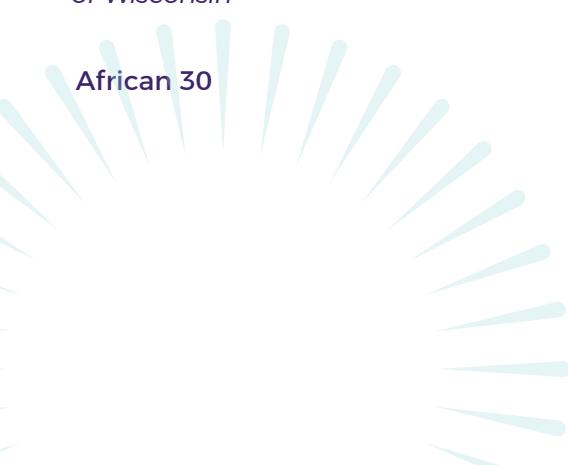
WALA is thrilled to announce a partnership with the American Seniors Housing Association (ASHA) to launch a new digital marketing campaign in 2026 built on the success of ASHA's [whereyoulivematters.org](http://whereyoulivematters.org). [Whereyoulivematters.org](http://whereyoulivematters.org) (WYLM) is a non-profit website that utilizes digital marketing to consumers to drive traffic directly to communities, bypassing on-line lead aggregators and third-party referral agencies such as A Place for Mom, Caring.com, Care.com, CarePatrol, Seniorly, Oasis, etc. Through this combined effort, we will provide consumers with transparency and choice. In addition, WALA will be at the forefront of educating healthcare providers, such as hospitals, skilled nursing providers, county ADRC's, etc. about the power of Where You Live Matters. WYLM will provide these important partners an easy tool to utilize with their patients and families in a non-biased way with ease and confidence. This partnership aligns all of our efforts to provide our prospects unfiltered information to find their best home possible – because where you live, does matter.

### What I Wish I Had Known: A Caregivers Journey

*Martin Schreiber, Author:  
"My Two Elaine's", 39th Governor  
of Wisconsin*

Elaine Schreiber, Marty's late wife, was diagnosed with early-onset Alzheimer's more than 20 years ago. He took care of her himself for more than 10 years until she needed the care available in a memory care community, where she lived until her death three years ago. In 2016, he wrote a book, "My Two Elaines", that details his struggles in caring for her as the disease progressed. Ultimately, he realized that he could cope and survive only after recognizing he had to let go of the Elaine he knew and accept the new person she had become. Marty's primary message is that if Alzheimer's is bad, ignorance of the disease is even worse. The main reason he wrote his book was because he wished someone had told him what to expect and how to deal with the challenges he and Elaine faced. With nearly 7 million Americans age 65 and older living with Alzheimer's today, many of them cared for at home by a spouse or other loved one, Marty is tireless in his efforts to build awareness around Alzheimer's and its impact nationwide and to provide hope to caregivers.

African 30



# THURSDAY 3:30PM - 4:30PM

## CONCURRENT BREAKOUT SESSIONS

### Assisted Living and Mental Illness

Colleen Toebe, VP of Clinical Services:  
Pathway Health

#### African 40

Thank you to our Sponsor:  
R&R Insurance

Caring for individuals in assisted living facilities is becoming increasingly challenging. It is estimated that approximately 35% of residents experience depression, anxiety, severe cognitive impairment, substance use disorder or serious mental illness. Supporting mental health in assisted living facilities requires training licensed nurses and care providers to recognize, manage, and understand mental health conditions. Make it a priority to join and discover effective approaches for training staff in providing care for individuals with mental health conditions.

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### Ethics, Autonomy, and the Dignity of Risk: Part 2

Michael Gillette, PhD, Ethicist: Bioethical Services of Virginia, Inc.

#### African 50

Part 2 of this highly interactive and case-based discussion will examine the interplay of personal autonomy and the duty to protect individuals from harm. We will begin by reviewing core ethical values concerning autonomy and protection from harm, and then move on to discuss appropriate and inappropriate interventions to mitigate risk. We will consider topics such as autonomy and the dignity of risk, protection of harm to self, protection of harm to others, and the safety and well-being of providers.

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### Elevating Quality and Reducing Risk: Strategic QA and Risk Mitigation: Part 2

Sara Kekula, Director of Senior Living & Social Services Practices and Partner; M3 Insurance & Taylor Goodland, Client Executive; M3 Insurance

#### African 60

The purpose of this session is to equip assisted living leaders with actionable strategies to strengthen Quality Assurance (QA) programs and reduce operational risk. The presentation will align with Wisconsin regulatory expectations and industry best practices, helping organizations proactively manage liability while improving resident outcomes. Attendees will leave with a better understanding of the components of a strong QA program, how to identify high-risk operational areas in assisted living, how to implement risk mitigation strategies, and how to align documentation and practices with DHS and survey expectations.

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### From Burnout to Buy-In: Using Creativity to Reignite Staff Passion

Sarah Robertson, National Director of Training & Customer Service: Aegis Therapies & Arianna Culler

#### African 70

Discover the Power of Creative Engagement to Transform Workplace Culture. Explore how integrating creative challenges and exercises—such as incentive programs, contests, “get-to-know-you” activities, and team-building initiatives—can reignite purpose and joy among staff. These strategies not only reduce turnover but also empower employees to cultivate a strong sense of community within their work environment, positively influencing both staff and resident retention. Attendees will leave with a comprehensive 12-month calendar of staff engagement activity ideas, plus one fully developed, ready-to-launch challenge for each quarter—providing a practical and inspiring roadmap to kickstart your staff engagement journey.

# THURSDAY 3:30PM - 4:30PM

## CONCURRENT BREAKOUT SESSIONS

### Creating More Success Through Assisted Living Development Projects

*Tristan Dollinger, Shareholder: von Briesen & Roper, S.C, Aaron Klug, Production Manager: Community*

African 80

This multidisciplinary panel brings together architecture, engineering, and legal experts to provide a comprehensive look at the development of modern assisted living facilities, whether new builds, renovations, SNF conversions, or licensing existing structures. As demand for high-quality senior living environments grows, successful projects require coordinated planning across regulatory, design, and technical domains. Panelists will discuss the Office of Plan Review and Inspection plan review process, legal and regulatory considerations and updates, best practices, current trends, and recent changes to the plan review and licensing processes. Attendees will gain a clearer understanding of the challenges and opportunities associated with developing assisted living facilities, along with practical guidance for navigating the complex interdisciplinary coordination required for project success.

### 5:00 - 7:00pm Prize Drawing Reception + Elite Cornhole Tournament

*Thank you to our sponsor:  
Herzing University*

Front Foyer

As we wrap up the day, stick around for one final stretch of networking and FUN! We will announce our exhibitor prize drawing winners and enjoy our 4th Annual Cornhole Tournament where all in attendance have a chance to win prizes! Come cheer on your favorite cornhole team, participate in additional games, and wrap up the day with us.



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# ENCORE!

Creating **MORE** Success

# FRIDAY FEBRUARY 27

## 8:30am - 9:00am Light Breakfast

Front Foyer

Thanks to our sponsor:  
Oak Medical Group



As we begin our final day, join us for a light breakfast in the foyer before breakout sessions begin.

## FRIDAY 9:00AM - 10:00AM CONCURRENT BREAKOUT SESSIONS

### Discussions with Doug

*Doug Englebert, Pharmacy Practice Consultant: Bureau of Technology, Licensing and Education*

African 10

As consultants and advocates for your residents, you have a lot of responsibility for the day-to-day clinical process in your community. Attending this yearly favorite session allows for open Q&A with the pharmacy practice consultant of Wisconsin. You will receive answers about medications and processes along with any other pharmacy-related questions you may have.

### When Care Meets Cameras: Balancing Safety, Privacy, and Dignity in Assisted Living

*Jenna Helminski, State Long Term Care Ombudsman: Board on Aging and Long Term Care*

African 20

Electronic monitoring can enhance safety - but it can also compromise privacy and trust. This session explores the use of cameras, audio recorders, and other devices in assisted living through the lens of resident rights. Learn practical approaches for balancing protection with dignity, addressing consent and roommate issues, and creating thoughtful policies that support residents while reducing legal and ethical risks.

### Creating More Success by Caring for the Caregivers

*Dave Molenda, Founder: Positive Polarity*

African 30

Caregivers give so much of themselves every day, yet their dedication often comes with stress, burnout, and overlooked needs. Creating More Success by Caring for the Caregivers shines a light on the vital connection between supporting caregivers and achieving organizational excellence. This session will explore practical strategies to nurture, empower, and sustain those who give their all—because when caregivers thrive, everyone benefits.

# FRIDAY 9:00AM - 10:00AM

## CONCURRENT BREAKOUT SESSIONS

### Leading with Care: Recognizing and Responding to Burnout in Your Team

*Patrice Flanagan-Morris, LCSW,  
Psychotherapist, Community Educator,  
Brainspotting Consultant: Empowerment  
Within LLC*

African 50

In the helping professions, compassion is at the heart of the work — but even the most dedicated teams can run on empty. As a leader, it can be challenging to balance organizational demands with supporting the emotional well-being of your staff. This presentation helps leaders identify the early signs of burnout, understand its impact on performance and morale, and learn practical ways to respond with empathy and effectiveness. Through a blend of education and reflection, participants will explore the difference between stress, compassion fatigue, and burnout; learn how workplace culture and leadership styles can either fuel or reduce exhaustion; and leave with actionable tools to foster a healthier, more sustainable environment for themselves and their teams.

### The Appeals Process for Assisted Living - You Can Do It!

*Robert Lightfoot, RN, Shareholder,  
Health Care & Corporate Practice Groups:  
Reinhart Boerner Van Deuren S.C.*

African 60

The appeals process for CBRFs and RCACs can be daunting and mystical. Attorney Bob Lightfoot will take the “daunt” and “mystery” out of the process for you. Learn how to appeal a citation, a No Admit Order or even a Revocation in this exciting and dynamic session.

### Harnessing AI - Transformative Applications in Design, Construction & Operations in Senior Living

*Isaac Wallace, Market Sector Leader:  
ERDMAN, Andy Fetzer*

African 70

In this panel, we will explore how “artificial intelligence” (AI) is revolutionizing design, construction, and operations within the senior living sector. Attendees will gain insights into AI’s role in optimizing design processes, improving construction efficiency, and enhancing operational outcomes. Key points include practical AI applications, case studies showcasing successful implementations, and future trends. Participants will take away actionable strategies for leveraging AI to drive innovation, efficiency, and improved resident experiences in senior living communities.



**FRIDAY 10:15AM - 11:15AM**

# CONCURRENT BREAKOUT SESSIONS

## Legislative Updates

*Forbes McIntosh, Government Relations Consultant:  
Government Policy Solutions*

### African 10

Thanks to our Sponsor:  
von Briesen & Roper S.C.

We are fortunate to have Forbes join us year after year to shed some light on up to date legislative initiatives and changes. Forbes will discuss legislative updates and regulatory changes, as well as the effect the budget will have on assisted living. Attendees will also learn what they can do to help the legislative process and how they can be more involved.

## Challenging Ageism through Peer Support, Education, and Storytelling

*Andrew Steward, PhD, LCSW,  
Assistant Professor of Social Work:  
UW-Milwaukee*

### African 20

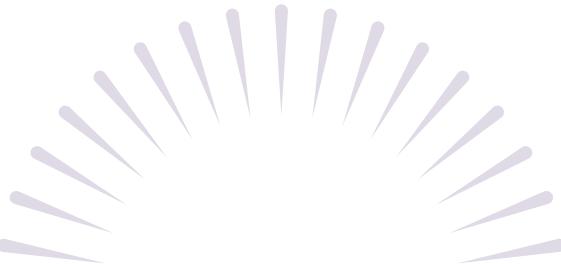
This interactive session will start with an overview of what ageism is, including several types of ageism with examples (such as internalized, interpersonal, and institutional ageism). We will cover the ways ageism is internalized and affects physical and mental health across the life course. Did you know that embracing positive views of aging is associated with increased longevity of about 7.5 years and a 49.8% reduced likelihood of developing dementia? Strategies for reframing internalized ageism and responding to interpersonal ageism will be provided, and participants will have the opportunity to practice applying these strategies through role-plays. We will cover the latest research on effective interventions to reduce ageism, and explore a new approach for providing education and storytelling through peer support groups facilitated by trained older adults. This session will emphasize the importance of building networks of peer groups led by older adults themselves to build a sense of collective self-efficacy in efforts to reframe aging.

## Turning Employee Voices into Actionable Results: The Power of Stay Conversations

*Shelly Dretzka,  
Owner: aHRow, LLC*

### African 30

This interactive session explores the power of actively engaging employees through meaningful feedback conversations. Participants will learn how to ask the right questions, listen with intent, and transform employee voices into actionable strategies that drive higher engagement, stronger retention, and increased trust across the organization. Through real-world examples, practical exercises, and group discussions, attendees will: Discover the benefits of regular feedback and stay conversations for both employees and leaders. Learn best practices for asking questions that elicit honest, actionable insights. Explore techniques for analyzing feedback and turning it into tangible workplace improvements. Build skills to follow up and close the loop, ensuring employees feel heard, valued, and motivated. By the end of the session, participants will leave with concrete tools and strategies to create a culture where feedback drives action, engagement flourishes, and employees choose to stay.



**FRIDAY 10:15AM - 11:15AM**

## CONCURRENT BREAKOUT SESSIONS

### **Speak Early, Solve Easily: Proactive Grievance Practices in Assisted Living**

*Lauren Davis, RN, Owner:  
Davis Clinical Consulting*

**African 50**

### **Navigating Employment Claims in Long-Term Care: Strategies for Defense and Compliance**

*Michael Sherer, Income Shareholder:  
von Briesen & Roper, S.C.*

**African 60**

This presentation focuses on shifting from a reactive to a proactive approach in handling grievances with assisted living communities. By fostering open communication, trust, and early intervention, we can identify and address concerns before they escalate.

This presentation will equip long term care providers with practical tools to investigate, defend, and proactively avoid common employment claims unique to the industry's 24/7, highly regulated environment. The presentation will address discrimination, harassment, retaliation, wrongful termination, leave interference/retaliation (FMLA/ADA interplay), whistleblower and patient safety complaints, emphasizing early case assessment, preservation of ESI and timekeeping data, targeted witness interviews, root cause analysis, and defense themes tailored to staffing and acuity realities. A dedicated segment will focus on class and collective wage and hour exposures under the Fair Labor Standards Act, including misclassification of nurses and department leads, off the clock work, meal/rest break compliance, rounding, shift differentials, on call, and donning/doffing issues, with coverage of certification/conditional certification strategies, damages modeling, and settlement frameworks. We will translate lessons learned into actionable compliance and risk management steps—policy auditing, lawful scheduling and timekeeping design, supervisor training, complaint intake and anti retaliation protocols, leave coordination workflows, and internal pay practice self audits—positioning attendees to reduce claim frequency and severity while strengthening defensibility when litigation arises.

### **Confidently Performing Mandatory Psychotropic Medication Reviews**

*Jay Charles, RN: Streuss Pharmacy &  
Andrew Saether, RphD: Streuss Pharmacy*

**African 70**

Complete the every 3 month Psychotropic Medication Review DHS standard with confidence. We will review what is included in a psychotropic med review, how to perform a psych assessment, side effects of psychotropic medications, and tips on when to make changes and possible changes. We are hoping to answer your questions on this topic and make your Quarterly Psychotropic Medication Reviews easier and more indepth.

# FRIDAY FEBRUARY 27

## 11:30am - 12:45pm Lunch, Closing Session + PAC Raffle Prizes

Updates with BAL Director  
Ken Brotheridge

African West

Join us for lunch as we conclude with a general session led by Ken Brotheridge, Department of Health Services Bureau of Assisted Living Director. Ken will walk us through the latest updates and answer common questions that are had between all assisted living communities. At the conclusion of Ken's session, we will announce winners of WALA's PAC Raffle.

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