



## **2023 MCSA Conference – Lake Geneva, WI** **CELEBRATING YOUR LEGACY**

### **SUNDAY, JUNE 11, 2023:**

- 10:30 a.m. – 12:30 p.m. MCSA Board Meeting
- 12:30 p.m. – 4:30 p.m. Sponsor Registration and Booth Setup
- 3:00 p.m. – 4:30 p.m. Attendee Registration
- 4:45 p.m. – 5:00 p.m. Transportation to Riviera Docks
- 5:15 p.m. – 5:30 p.m. Boarding of the Lady of the Lake Boat
- 5:30 p.m. Boat LEAVES the Dock**
- 5:30 p.m. – 7:30 p.m. Dinner Cruise on Geneva Lake (**ADDITIONAL COST**)
- 7:30 p.m. – 8:00 p.m. Transportation back to Grand Geneva Resort
- 8:00 p.m. – 10:30 p.m. Desserts and Cocktails Under the Stars at the Grand Geneva Resort

### **MONDAY, JUNE 12, 2023:**

- 7:30 a.m. – 2:00 p.m. Registration
- 8:00 a.m. – 8:30 a.m. Breakfast Buffet in Sponsor Area
- 8:30 a.m. – 8:50 a.m. Opening Comments – MCSA Chair – Ballroom  
Welcome to Wisconsin  
Sponsor Spotlight (5 minutes each) – 2
- 9:00 a.m. – 10:00 a.m. **Opening Keynote:** It's About Heart – Team first mentality during challenging times –

#### **Brianna Decker**

Brianna brings a wealth of experience from years competing at the highest levels of Women's hockey. She will discuss the difference between talent and heart and the 1% that is the difference between championships and runner up. She will review how selflessness is the key for team success and how your response to failure can impact future success. Following her presentation, Brianna is excited to engage the audience with Q&A.

10 a.m. – 10:30 a.m. Break with Sponsors

10:30 a.m. – 11:30 a.m. Breakout Sessions

#### **1. Outreach Session – Outreach Networking Session – Part 1**

**Sabrina Montes, Chief Strategic Officer of Masonic Homes of California**

**Sol Silverman, Director of Masonic Assistance and Outreach of Masonic Homes of California**

Join us for an interactive opportunity to connect with other masonic colleagues. You will have the chance to learn about outreach programs and services in other jurisdictions, as well as the opportunity to share what is happening in your jurisdiction. This session provides attendees a meaningful way to connect, share ideas and strategies, ask for guidance, and even partner with each other when serving members who may be living in a colleague's jurisdiction.

#### **2. Community Session – Positioning for Sustainability in Skilled Nursing**

**JP Venoit, Masonicare**

**Additional Provider, TBD**

**Moderator: Keith Robertson, Ziegler**

What is the future of skilled nursing? This is one of the most common strategic questions posed by providers today. While many providers have been downsizing their skilled nursing footprint, skilled nursing is not going away. This session will discuss many of the current pressures facing the healthcare space, but will focus on strategic positioning to ensure viability as a skilled nursing provider.

### **3. Board Session – Back to Basics: Essential knowledge about Not-For-Profit Boards of Directors – Bob Roth, Three Pillars Board of Directors**

How to make sure your Board is high performing and doing what it is supposed to do.

Learning Goals: Understand Corporate Governance, clearly understand what a board is not supposed to do, and what is it supposed to do.

11:30 a.m. – 12:30 p.m. Lunch with Sponsors – Ballroom

Sponsor Spotlight (5 minutes each) – 2

12:30 p.m. – 1:00 p.m. MCSA Membership Meeting Including Installation of Officers

1:00 p.m. – 1:15 p.m. LeadingAge Update

1:15 p.m. – 1:30 p.m. Dessert Break with Sponsors

1:30 p.m. – 2:30 p.m. Breakout sessions

#### **1. Outreach Session – Outreach Networking Session – Part 2**

**Sabrina Montes, Chief Strategic Officer of Masonic Homes of California**

**Sol Silverman, Director of Masonic Assistance and Outreach of Masonic Homes of California**

Join us for a deep-dive outreach networking session, where you will have the chance to learn more about outreach programs and services that interested you most from the Outreach Networking Session, Part 1. Attendees will have the chance to participate in small group discussion on outreach services and programs they want to learn more about. This may include Lodge Outreach Programs, Lodge Partnership Programs, Widows Programs, Children's Programs, etc.

#### **2. Community Session – Mixing It Up! – Changing from Age-Segregated to Intergenerational –**

**Mark Strautman, Three Pillars Senior Living Communities**

**Craig Witz, The Witz Company**

**Craig Kimmel, RLPS Architects**

**Change is Coming:** As design and operations of senior living has evolved from institutional to residential - small, repetitive living units have given way to a variety of deluxe-sized apartments, and all-inclusive, one-size-fits service packages now trend toward à la carte services and a person-first operations philosophy

**Think Like A Boomer:** This session will explore the distinctly different influences, relationships, values, and thoughts of the baby boomers from the current generation of seniors and how these differences affect their viewpoint of life plan communities. This session will provide guidelines for employing intergenerational planning strategies at macro and micro scales that can have a profound impact on future marketability.

**Next-Gen Seniors Want a Different Experience:**

Presenters will explore seven principles of intergenerational planning and will demonstrate how these principles address social and community connections, human scale, diversity/equity/inclusion, and placemaking within LPCs.

**Planning Into Practice:** Finally, the presenters will show how these principles can be applied at a large-scale master planning level, as well as smaller, bite-size projects to create market-forward senior living experiences.

#### **3. Board Session – How to be an Effective Board Member –**

**Bob Roth, Three Pillars Board of Directors**

Examination of the two jobs each Board Member must do. Learning about how those jobs interrelate. Short examination of best board practices as a Board member.

2:30 p.m. – 3:15 p.m. Break

3:15 p.m. – 4:15 p.m. Transportation to Three Pillars 4:15 p.m. – 7:30 p.m. Tours and Dinner at Three Pillars Senior Living Communities

7:30 p.m. – 8:30 p.m. Transportation Back to Hotel

8:30 p.m. – 10:30 p.m. Hospitality

## **TUESDAY, JUNE 13, 2023:**

8:00 a.m. – 8:30 a.m. Breakfast Buffet in Sponsor Area

8:30 a.m. – 9:00 a.m. Opening Comments – MCSA Chair – Ballroom  
Comments about 2024 Conference

9:00 a.m. – 10:00 a.m. **General Session: Collaborative vs Distinct roles between Grand Lodge and Business Operations – Paul Tourville, PGM F&AM of Wisconsin**

### **Mark Strautman, Three Pillars Senior Living Communities**

Operating a health services organization within the framework of a fraternal sponsor can be wonderful and it can be conflicting. Identifying respective visions, goals and initiatives and everyone's role in the partnership is crucial to success and harmony. Paul has a unique perspective from both the Grand Master's chair and years of Board involvement on the business operating side. He has successfully worn both hats simultaneously and has provided leadership that resulted in harmonious collaboration.

10:00 a.m. – 10:15 a.m. Break with Sponsors

10:15 a.m. – 11:15 a.m. Breakout Sessions

### **1. Outreach Session – The Ohio Masonic Home Resource Center Bereavement Program, and Volunteer Program:**

#### **Bobbi Schickler Ohio Masonic Home Resource Center**

#### **DeAnna J. Kinney, Ohio Masonic Home Resource Center**

Listen to Bobbi Schickler, Community Outreach Coordinator/Bereavement Program Coordinator and DeAnna Kinney Community Outreach Coordinator/Masonic Volunteer Program Coordinator share about their Bereavement Program, how it works, how it's grown, new things they are working on, and how their Bereavement Program and Volunteer Program work together.

### **2. Community Session – Investing with Social and Environmental Intentions in Support of Masonic Communities**

#### **Brian Maxwell, Mill Creek**

#### **Sean Bannon, Mill Creek Financial Advisors**

#### **Patrick Burke, Mill Creek Financial Advisors**

This session will discuss constructing investment portfolios with social and environmental goals, the return and risk implications, and the array of methods of implementing these strategies. We will also address ESG implications of the Inflation Reduction Act of 2022.

**11:30 a.m. – 12:30 p.m. Breakout Sessions**

### **1. Outreach Session - Financial Education/Counseling Impact on Outreach Assistance**

#### **Carly Dibben, Masonic Home of Missouri**

As presented by Carly Dibben, Financial Assistance & Education Programs Manager, a look at what prompted the development of the Masonic Home of Missouri's Financial Education program and the impact the program has had on Outreach assistance and its participants. Carly will outline the economic influences that influenced trends in assistance requests that inspired the development of the program, the steps taken to implement the program, and evolution of all the Home's Outreach programs as a result.

### **2. Community Session –Are SNF's a financial sinkhole or a golden goose?**

#### **Jill Krueger, Symbria**

#### **Joe Mulligan, Cain Brothers, a division of KeyBanc Capital Markets**

A high level discussion about the financial challenges of operating skilled nursing facilities and the strategies utilized to mitigate.

12:30 p.m. – 1:15 p.m. Lunch with Sponsors – Ballroom

1:15 p.m. – 2:15 p.m. Breakout Sessions

### **1. Workforce Readiness Session – Challenges and Strategies in Today's Critical Workforce Environment: Barriers, Culture, Retention and Recruitment**

#### **Tracy Armwood, WhiteStone: A Masonic & Eastern Star Community**

#### **Kathy Bernaden, Three Pillars Senior Living Communities**

Today's challenging labor market continues to be top priority for every Human Resource Professional, every CEO down to the team on the front line. Join our panel of experts as we tackle the impact of today's talent crisis in our organizations. We will discuss workforce barriers and how organizations can meet the challenge. Understand that culture matters and do we engage workers in the new reality of work. We will tackle recruitment and retention and the understand that everyone recruits!

## **2. Community Session – Creating an Integrated Care System for Low and Middle Income Seniors**

### **David Mercugliano, HealthPRO Heritage**

This presentation focuses on not only our shifting national demographics, but the pilot project launched by HealthPRO Heritage and NewCourtland ( a mission-based NFP SNF, housing, and Aging Services provider) and an informal care collaborative assembled to support 5000+ under-served elderly across Center City Philadelphia. This pilot has focused on building collaboration between unrelated entities to engage and support these residents, share data, and demonstrate better population health management/ health risk mitigation. Together we will explore the reasons providers may have for engaging in programs like this, which offer new avenues for diversification to support constituents, as well as potential roads forward for long term enterprise sustainability.

2:15 p.m. – 2:30 p.m. Break

### **2:30 p.m. – 3:30 p.m. General Session – Accelerating Technology Adoption in Senior Living & Care**

#### **Tom Meyer, Ziegler**

#### **Adrian Judy, Masonic Homes of Kentucky**

One of the silver linings of the COVID-19 pandemic, if you will, is that the degree to which technologies were adopted in the senior living and care space increased dramatically. Much of the accelerated rate of adoption over the past three years, has been around speed of adoption and putting solutions in place that have assisted with navigating the pandemic. What in the past may have been more of a choice to adopt a particular technology or platform, quickly became a necessary implementation. Many unknowns still remain, but what is certain is that technology adoption, technology spending, and healthcare innovation will continue to move forward at a fairly rapid pace.

Ziegler and Masonic Homes Kentucky (to be confirmed) will feature some of its latest research on technology adoption and spending and will share resources available for providers (white papers, etc.). Panelists will share their insights into various sub-topics related to technology such as telehealth, resident engagement solutions and workforce technologies to name a few.

3:30 p.m. – 3:45 p.m. Closing Comments

3:45 p.m. – 4:30 p.m. Break

4:30 p.m. – 5:30 p.m. Transportation to Old World Wisconsin

5:30 p.m. – 8:30 p.m. Historic Brewery Experience & Beer Pairing Dinner

8:30 p.m. – 9:30 p.m. Transportation to Hotel

9:30 p.m. – 11:00 p.m. Hospitality