



2023 MCSA Conference – Lake Geneva, WI

CELEBRATING YOUR LEGACY

SUNDAY, JUNE 11, 2023:

- 9:30 a.m. – 12:00 p.m. MCSA Board Meeting
- 2:30 p.m. – 4:30 p.m. Sponsor Registration and Booth Setup – **Grand Ballroom Coat Check**
- 3:00 p.m. – 4:30 p.m. Attendee Registration – **Grand Ballroom Coat Check**
- 4:45 p.m. – 5:00 p.m. Buses Leave - **Buses Leave from Main Lobby 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 – **Landing and Pavilion**

MONDAY, JUNE 12, 2023:

- 7:30 a.m. – 2:00 p.m. Registration – **Grand Ballroom Coat Check**
- 8:00 a.m. – 8:30 a.m. Breakfast Buffet in Sponsor Area – **Grand Ballroom**
- 8:30 a.m. – 9:00 a.m. Opening Comments – MCSA Chair – Ballroom
Welcome to Wisconsin
Sponsor Spotlight – **Ziegler and Mill Creek Advisors**
- 9:00 a.m. – 10:00 a.m. **Opening Keynote: It's About Heart – Team first mentality during challenging times –**
Brianna Decker
- 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 – Galewood B**
Sabrina Montes, Chief Strategic Officer of Masonic Homes of California
Sol Silverman, Director of Masonic Assistance and Outreach of Masonic Homes of California
- 2.Community Session – Positioning for Sustainability in Skilled Nursing – Galewood A**
JP Venoit, Masonicare
Moderator: Keith Robertson, Ziegler
- 3. Board Session – Back to Basics: Essential knowledge about Not-For-Profit Boards of Directors – Galewood C**
Bob Roth, Three Pillars Board of Directors
- 11:30 a.m. – 12:30 p.m. Lunch with Sponsors – **Grand Ballroom**
Sponsor Spotlight – **Symbria**
- 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 – Galewood B

Sabrina Montes, Chief Strategic Officer of Masonic Homes of California

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

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

Mark Strautman, Three Pillars Senior Living Communities

Craig Witz, The Witz Company

Craig Kimmel, RLPS Architects

3. Board Session – How to be an Effective Board Member – Galewood C

Bob Roth, Three Pillars Board of Directors

2:30 p.m. – 3:15 p.m. Break

3:00 p.m. – 3:30 p.m. Buses load - **Buses Leave from Main Lobby Registration**

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 – **Evolve Lounge**

TUESDAY, JUNE 13, 2023:

8:00 a.m. – 11:30 a.m. Registration – **Grand Ballroom Coat Check**

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

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

10:00 a.m. – 10:15 a.m. Break with Sponsors – **Grand Ballroom**

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

1. Outreach Session – The Ohio Masonic Home Resource Center Bereavement Program, and Volunteer Program – Galewood B

Bobbi Schickler Ohio Masonic Home Resource Center

DeAnna J. Kinney, Ohio Masonic Home Resource Center

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

Brian Maxwell, Mill Creek

Sean Bannon, Mill Creek Financial Advisors

Patrick Burke, Mill Creek Financial Advisors

3. HR/Workforce Readiness Networking – Galewood C

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

1. Outreach Session - Financial Education/Counseling Impact on Outreach Assistance – Galewood B

Carly Dibben, Masonic Home of Missouri

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

Jill Krueger, Symbria

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

3. HR/Workforce Readiness Networking – Galewood C

12:30 p.m. – 1:15 p.m. Lunch with Sponsors – **Grand 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 – Galewood C

Tracy Armwood, WhiteStone: A Masonic & Eastern Star Community

Kathy Bernaden, Three Pillars Senior Living Communities

Trasee Whitaker, Masonic Homes of Kentucky

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

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

David Mercugliano, HealthPRO Heritage

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 – Grand Ballroom

Tom Meyer, Ziegler

Adrian Judy, Masonic Homes of Kentucky

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

3:45 p.m. – 4:30 p.m. Break

4:15 p.m. – 4:45 p.m. Buses Leave – **Buses Leave from Main Lobby Registration**

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 - **Evolve Lounge**