

2024 Spring Business Retreat Speaker & Session Information							
Day, Time & Track	Session # & Title	Session Description	Speaker First Name	Speaker Last Name	Job Title	Organization	
Wed., May 1st 2pm-4pm	Pre-Conference Training Session 1 DD Business 101	Through insightful discussions and practical examples, participants will gain a deep understanding of cost-reporting, rate models and the important role that data plays when it comes to future investment and policy decisions. The session will also provide the participants with opportunity to learn more about billing procedures, learn to identify and avoid common billing mistakes, and explore solutions to address system concerns. Whether you're a seasoned provider or new to the field, this session promises valuable insights to optimize your billing practices and enhance overall revenue management.	Kristi	Black	CEO	Nineteen Services	
			Co-Speaker:	Clay	Weidner	CFO	Ohio Department of Developmental Disabilities
Thurs., May 2nd 9:30am-10:30am	Session 2 Toledo Business Leaders Panel	Moderated discussion on business leadership within the Toledo region.	Brent	Cousino	CEO	Browning Cousineau Corp.	
			Panel Speaker:	Ryan	Laskey	Senior Vice President, Commercial Vehicle	Dana Incorporated
			Panel Speaker:	Jayne	Mazur	Relationship Manager	Destination Toledo
Thurs., May 2nd 10:45am-11:45am	Sponsored Session Compliance Using Brittco - It Doesn't Get Easier Than This	Brittco's new Brittco Pro is the only software solution that integrates Providers and County Boards into one common platform. Why does this matter? If you're looking for the simplest way to maintain fully compliant documentation, it matters. Outcomes & Experiences (hint: no more copying and pasting), MARS, Behaviors, Incidents, DSP Training, and more. Come join us and see why Brittco Pro is the future. It's going to be fun.	Scott	Flowers	CEO	Brittco	
Thurs., May 2nd 10:45am-11:45am	Sponsored Session The Provider's Edge: Find and Unleash the Hidden Potential in Your Agency	Navigating the intricate landscape of agency management and expansion often seems like two distinct journeys. Uncover the intersections where these paths seamlessly converge, unlocking the potential for accelerated growth. Come away with a roadmap to identify hidden opportunities, capture them and automate them through tech. More importantly, come away with a plan for growth in your agency.	Evan	Andersen	VP, Sales and Marketing	giv.plus	
Thurs., May 2nd 10:45am-11:45am	Sponsored Session Mastering Emotional Intelligence (EI) for IDD Leadership Success: Unveiling the Power of Six EI Competencies	<p>In the realm of Intellectual and Developmental Disabilities (IDD) leadership, Emotional Intelligence (EI) emerges as the cornerstone of success for 2024 and beyond. Join us for an engaging one-hour presentation that explores the transformative impact of Emotional Intelligence on elevating IDD leadership effectiveness to new heights. This session will provide IDD leaders with profound insights and actionable strategies to harness the power of Emotional Intelligence, foster stronger team dynamics, promote person-centered care, and nurture a culture of success within their organizations.</p> <p>All participants will be completing a hands-on assessment on their own EI as we explore the Six EI Competencies:</p> <ol style="list-style-type: none"> <li>Self-Awareness: Dive into the foundational competency of Emotional Intelligence - self-awareness. Gain a deep understanding of your emotions, strengths, and growth areas as an IDD leader. Recognize how heightened self-awareness fuels authentic leadership and creates a positive leadership presence.</li> <li>Awareness of Others: Embrace the power of empathy and the awareness of emotions in others, including individuals with IDD, families, and team members. Learn how this competency fosters trust, strengthens relationships, and cultivates a person-centered approach to care.</li> <li>Authenticity: Explore the significance of authenticity in leadership. Understand how leading with genuine emotions and transparency inspires teams, promotes psychological safety, and creates a culture of openness and trust.</li> <li>Emotional Reasoning: Master the art of emotional reasoning, enabling IDD leaders to make sound decisions by blending emotions with reason. Discover how this competency enhances problem-solving and conflict resolution skills.</li> <li>Self-Management: Uncover strategies for effectively managing emotions in high-pressure situations. Develop emotional resilience and composure to lead confidently amidst challenges.</li> <li>Positive Influence: Learn to wield positive influence as an IDD leader, inspiring and motivating others to achieve their best.</li> </ol>	Stacy	Sufka	Chief Executive Officer	Gladey Consulting, LLC	

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Thurs., May 2nd 10:45am-11:45am	<b>Sponsored Session</b> How Agencies are Doing 'Tech First': Ohio Providers Sharing Their Technology Initiatives		Ken	Smith	Co-Founder/CEO	NextGenAT, Inc.
			<b>Panel Speaker:</b> Michelle	Madden	CEO	Independence of Portage Co.
			<b>Panel Speaker:</b> Becky	Sharp	CEO	Open Door Columbus
			<b>Panel Speaker:</b> Melissa	Combs	Director of Operations	Open Door Columbus
			<b>Panel Speaker:</b> Chris	Page	CEO	Threshold Residential Services
			<b>Panel Speaker:</b> Seth	Walker	Program Director	Threshold Residential Services
			<b>Panel Speaker:</b> Jenn	Riha	VP of Programs	I Am Boundless
			<b>Panel Speaker:</b> Nathan	Henniger	Regional Director	I Am Boundless
Thurs., May 2nd 10:45am-11:45am	<b>Sponsored Session</b> Person-Centered/Data Driven EHR demo/Q&A	Learn about Therap's Comprehensive Documentation and Information Management System. Person-Centered solutions your organization can use to support agency workflows, communication, compliance, organizational outcomes, revenue management, and more!	Julie	Bowden	Business Development	Therap Services
Thurs., May 2nd 1:00pm-2:00pm <b>Executive Leadership Track</b>	<b>Session 3</b> Strategic Fusion: Boundless and Koinonia's Path to Success	Strategic Fusion: Boundless and Koinonia's Path to Success Uncover key lessons, strategic considerations, and effective board communication strategies that paved the way for success. From cultural integration to financial planning, this session provides a concise roadmap for navigating mergers, making it a must-attend for leaders and executives involved in organizational transformations.  Participants will: - Learn to recognize and leverage strategic alignments that contribute to a seamless merger, drawing insights from the successful integration of Boundless and Koinonia. - Gain practical skills in crafting clear and compelling messages for the board, ensuring transparent and timely communication throughout the merger process. - Explore best practices for merging diverse organizational cultures, equipping them with the knowledge to foster a harmonious and inclusive workplace during and after a merger.	Patrick	Maynard	President and CEO	I Am Boundless, Inc.
			<b>Co-Speaker:</b> Diane	Beastrom	Vice President, Transition	I Am Boundless, Inc.
Thurs., May 2nd 1:00pm- 2:00pm <b>Program Design Track</b>	<b>Session 4</b> Beyond Buzzwords: Understanding the Power of Organizational Culture	Discover the profound impact of organizational culture in this engaging session. Unpacking the reasons why organizational culture matters, we'll explore how it shapes employee engagement, productivity, and the overall success of your program or agency. Delve into the critical components that define your culture, including leadership values, communication strategies, and partnerships. Through real-world examples, gain a deeper understanding of how a strong organizational culture attracts and retains top talent, fosters innovation, and contributes to long-term success. Join us for a thought-provoking discussion on why organizational culture is a cornerstone for thriving workplaces and how you can leverage it to create a resilient and successful environment.  Learning Objectives: After attending participants will: - Understand the key components of the power of culture in an organization - Identify key principles in organizational culture - Have a framework for assessing their unique organizational culture - Have a deeper appreciation of how organizational culture can impact the behaviors of an organization	Dan	Connors	President and CEO	St. Joseph Home of Cincinnati

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Thurs., May 2nd 1:00pm-2:00pm Business, Finance and Operations Track	Session 5 The Business of Caring	Join us for a dynamic conversation with Scott DeLong, President and CEO of Champaign Residential Services, Inc. (CRSI). Gain insights into the proven business strategies that propelled him to success in roles as both Chief Financial Officer and Chief Executive Officer at one of the state's leading provider agencies. Discover the significance of rate models, learn to implement sustainable business practices, and identify key data for informed decision-making. Scott will share how to seamlessly blend delivering quality services with effective business management. Don't miss this opportunity to glean valuable expertise from Scott's journey at CRSI. Attendees will: -Gain a comprehensive understanding of rate models, their significance and impact, including the ability to analyze, interpret, and apply rate models to optimize financial strategies. -Learn actionable steps for implementing sustainable business practices and integrating financial sustainability with operational excellence. -Be equipped with skills to identify and utilize essential data for making decisions, recognizing key metrics, interpreting data trends, and leveraging this information to enhance both service delivery and overall business management.	Scott	DeLong	President and CEO	CRSI
Thurs., May 2nd 1:00pm-2:00pm Human Resources Track	Session 6 Navigating Unionization: Insights for HR Professionals and Management	Join us for an informative breakout session led by Vorys attorney Nelson Cary, where they will shed light on crucial considerations for management when faced with the potential of unionization. In this session, Nelson will share legal perspectives, strategic insights, and practical advice to help organizations proactively address and navigate the complexities associated with unions. This session will primarily discuss unions from the perspective of employers without unions but may serve as a review for employers with already existing unionized employees.  Attendees will: 1. Develop a foundational understanding of the legal aspects and employer requirements surrounding unionization. 2. Gain practical knowledge through real-world case studies and examples, equipping participants with strategic approaches unique organizational contexts, promoting a proactive and informed stance towards the possibility of unions. 3. Learn about current trends and patterns in unionization in and outside the healthcare system.	Nelson	Cary	Partner	Vorys, Sater, Seymour, and Pease, LLP
Thurs., May 2nd 1:00pm-2:00pm Supervision and Customer Service Track	Session 7 Empowering Frontline Supervisors: Insights from Toledo's "Best Places to Work"	Join two of Toledo's top employers (for over 10 years in a row!) as we delve into the strategies employed by top-tier organizations to support and empower their frontline supervisors. In today's dynamic workplace, frontline supervisors play a crucial role in bridging the gap between management and frontline teams. This session aims to uncover the valuable lessons learned from leading employers on how to effectively nurture and empower these key individuals, recognizing their pivotal role in retention and organizational culture. Attendees will: -Learn key elements and best practices in cultivating leadership skills at the frontline, contributing to the professional growth and effectiveness of frontline supervisors. -Explore effective communication strategies employed by leading organizations to keep frontline supervisors well-informed and connected with their teams. -Gain practical insights into methods for creating a positive and inclusive work environment, directly influencing both employee retention and the overall organizational culture.	Tim	Menke	CEO	Lott Industries
			Co-Speaker: Yvonne	McNulty	Former Partner	Self-Employed
Thurs., May. 2nd 2:30pm-3:30pm Executive Leadership Track	Session 8 Next Gen Managed Care: Navigating Medicaid, Building Alliances and Transforming Service Delivery	The Next Generation of Managed Care has created new opportunities, expanded services, and targeted outcomes like employment and food security. Next Gen also emphasizes partnerships, collaboration, and quality. In this session, you'll hear what Greg LaManna, one of Ohio's newest managed care CEOs, has learned about doing business in a Medicaid environment, building partnerships with regulators and funders, and re-branding managed care. He'll also share the value-added services plans are now offering that can benefit their members, including those who have "opted in" to managed care. This session provides a unique opportunity for executives and leaders to gain practical insights and strategies from a CEO who is successfully navigating the challenges of Medicaid while building strategic alliances to enhance service delivery. In this session, attendees will: -Understand the importance of collaboration and relationship-building to navigate the complexities of Medicaid while fostering mutually beneficial alliances. -Gain in-depth insights into the evolving landscape of Medicaid under the Next Generation of Managed Care, understanding key regulations, eligibility criteria, and service delivery dynamics. -Explore successful approaches to rebranding managed care in alignment with Next Gen principles, emphasizing partnerships, collaboration, and quality.	Greg	LaManna	President and CEO	Anthem
Thurs., May. 2nd 2:30pm-3:30pm Program Design Track	Session 9 Applying Quality Improvement Principles into Practice	This interactive session will help providers understand the basic components of a quality improvement program, and differentiate between quality assurance and quality improvement. The value of quality improvement tools in helping to reduce administrative burden, optimizing provider and staff performance, and improving outcomes will be demonstrated. Real world examples of quality improvement in action will be presented – from project initiation through final data analysis. All session participants will leave with a better understanding of how utilizing quality improvement principles can help providers and people with disabilities achieve their goals.	Erin	Brigham	Director of Quality and Product Operations	Caresource
			Co-Speaker: Shelly	Milvet	Quality Improvement Director	United Health Care C & S

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Thurs., May. 2nd 2:30pm-3:30pm Business, Finance, and Operations Track	Session 10 Development: Fundraising and Beyond	Join the panel discussion to hear from a panel of Toledo's premier development professionals. Panelist will explore trends in development, how the development mindset can be expanded beyond fundraising, and ways providers can find new partnerships. The diverse panel includes development professionals outside the developmental disabilities space and in for-profit businesses. This session hopes to have information for agencies at all stages of development from just starting out to expert level.			Director of Mission Advancement	Anne Grady Services	
			Julia	Hage			
			Panel Speaker:	Kim	Finch	Manager, Community Engagement and Events	Buckeye Broadband
			Panel Speaker:	John	Jones	President and CEO	HOPE Toledo
			Panel Speaker:	William	Mann	DIRECTOR OF DEVELOPMENT	BOYS AND GIRLS CLUBS OF TOLEDO
Thurs., May. 2nd 2:30pm-3:30pm Human Resources Track	Session 11 Process Improvement for Onboarding and Beyond	Tracy Owens of the Ohio State University will lead this essential session for Human Resources professionals seeking to elevate their onboarding strategies and enhance overall employee engagement and retention. In this session, attendees will explore innovative approaches to streamline the onboarding process, integrating cutting-edge technology and human-centered design principles to create a welcoming and efficient experience for new hires. Participants will learn how to assess their current onboarding practices, identify bottlenecks, and implement process improvements that align with organizational goals and culture. By the end of this session, HR professionals will be equipped with the knowledge and tools to revamp their onboarding processes, ensuring they not only comply with organizational standards but also exceed employee expectations. Join us to transform your onboarding process and lay the foundation for a thriving and engaged workforce.	Tracy	Owens	Associate Professor	The Ohio State University	
Thurs., May. 2nd 2:30pm-3:30pm Supervision and Customer Service Track	Session 12 The 3-Keys To Leadership	How you carry yourself and what you exude is representative of your brand or of the brand you're building. A brand that aligns with you and who you are is a brand that is easier to manage, it's a brand that doesn't require you to step outside of yourself, it's a brand that naturally grows and evolves as you grow and evolve—but first, you must know exactly who you are and how you are being received by your stakeholders. Learn how Self-Awareness, Emotional IQ and Self-Efficacy can be key factors to promoting efficiency and effectiveness in your organization. You will leave this session having a better understanding of the constructs, how to improve on them, and the impact they can have on your brand. Most importantly, you'll have a better understanding of "self" and how to efficiently and effectively align oneself with ones with brand.	Dr. Zakiya	Renae	Founder, Owner	Boutique Business Solutions	
Thurs., May. 2nd 4:00pm-5:00pm Executive Leadership Track	Session 13 The Confetti Connection: Build a Professional Network that Pops	How can some people turn five-minute conversations into life-long connections while others simply seem to be wasting their time? What makes one person the center of attention in the room while another stands off to the side, ignored by the crowd? Why do some people receive opportunities, introductions, and referrals from their network while others get nothing? The secret is in the depth, breadth, and quality of the connections you make as you build your network. Participants will learn how to: <ul style="list-style-type: none"> <li>Adopt continuous networking as a part of their professional life.</li> <li>Identify strategic networking partners.</li> <li>Create a process around follow-up, so no connection is wasted.</li> <li>Set realistic relationship expectations.</li> </ul>	Greg	Peters	Owner and Author	The Reluctant Networker	
Thurs., May. 2nd 4:00pm-5:00pm Program Design Track	Session 14 Leveraging Lived Experiences in Peson-Centered Planning	Does your organization struggle with person-centered planning for people with limited communication skills? How about supporting people who identify as LGBTQ+ or people of color in addition to having a developmental disability? People with developmental disabilities have rich, complex identities and lived experience, yet much of who a person is gets left out of the person-centered planning process. In this working session, Dr. Becca Monteleone and Dr. Ally Day from the University of Toledo's Disability Studies program will lead attendees through a guided discussion on common pitfalls and strategies for how providers can ensure they're truly centering the whole person they support to improve service delivery.	Dr. Rebecca	Monteleone	Assistant Professor	University of Toledo	
			Co-Speaker:	Dr. Allyson	Day	Associate Professor	University of Toledo
Thurs., May. 2nd 4:00pm-5:00pm Business, Finance and Operations Track	Session 15 Building Sustainable Futures	Join David Cutri, Executive Director of Internal Audit and Chief Compliance Officer for The University of Toledo, for this informative session about tightening up your operations, finances and accounting practices today to ensure a great tomorrow for your agency. David will share his experiences in both the public and private sector, supporting agencies of all sizes in creating lean, efficient operating practices using principles of Kaizen and Six Sigma. Attendees will gain invaluable insights into streamlining your organization's workflow, reducing waste, and maximizing value, setting the foundation for enduring success and resilience in an ever-changing environment. This is a unique opportunity to learn from a seasoned expert who bridges theory with practical, actionable strategies.	David	Cutri	Executive Director of Internal Audit and Chief Compliance Officer	University of Toledo	
Thurs., May. 2nd 4:00pm-5:00pm Human Resources Track	Session 16 Reinvigorating Your Employee Benefit Packages	Designing an employee benefit package can be stressful, especially for providers with limited income streams. With sky-rocketing prices and what seems to be endless options, finding the right mix of options and benefits that recruit and retain talent can seem insurmountable. In this session, join the benefits professionals from Gallagher to explore their research of their "Best in Class" employee benefit packages and how providers can realistically adopt some of these trends. This session will focus on health insurance benefits and other workplace incentive programs."	Suzi	Tamborelle	Voluntary Benefits Consultant	Arthur J. Gallagher & Co.	

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Thurs., May. 2nd 4:00pm-5:00pm Supervision and Customer Service Track	Session 17 Transforming Perspectives: The Future of Disability Services	Embark on a thought-provoking journey in our session that explores the evolution in beliefs and laws shaping the delivery of services to people with disabilities. The landscape of disability services is undergoing profound changes driven by shifting societal beliefs and evolving legal frameworks. Join us as we consider the transformative impact of these changes and envision the future of service delivery for individuals with disabilities. Attendees will: -Gain insights into the paradigm shifts that challenge traditional perspectives and foster a more inclusive and empowering approach to disability services. -Explore strategies and approaches that empower direct service providers to adopt inclusive practices in their interactions with individuals with disabilities. -Engage in a forward-looking discussion on the future of disability services, considering ongoing trends, emerging challenges, and opportunities.	Katie	Hunt-Thomas	Disability Rights Attorney and Director of Advocacy	The Ability Center
			Panel Speaker: Sarah	Heldmann, BS, COTA/L, ATP	Community Occupational Therapy Assistant	Wood County Board of DD
			Panel Speaker: Dawn	Bentley	Accessibility/Inclusivity Consultant	CAIRE, LLC
Fri., May. 3rd 9:00am-10:00am Executive Leadership Track	Session 18 Track Debrief	In this collaborative conference debrief session, you'll have a unique opportunity to connect with peers and dive into the insights gained during the event. This session is all about sharing key learnings, discussing challenges, and collectively identifying next steps post-conference. Engage in open conversations, contribute your takeaways, and participate in a dynamic knowledge exchange. This is more than just networking; it's a chance to debrief, learn, and chart the course forward together. 1. Participants will share and articulate at least one key insight or learning acquired during the conference, fostering a collaborative environment for knowledge exchange 2. Attendees will actively engage in open discussions to identify and discuss specific challenges faced during the conference, promoting a shared understanding of common issues within the group. 3. By the end of the session, participants will collaboratively outline their personal action steps and intentions based on the insights shared and challenges discussed.	Pete	Moore	President and CEO	Ohio Provider Resource Association
Fri., May. 3rd 9:00am-10:00am Program Design Track	Session 19 Track Debrief	In this collaborative conference debrief session, you'll have a unique opportunity to connect with peers and dive into the insights gained during the event. This session is all about sharing key learnings, discussing challenges, and collectively identifying next steps post-conference. Engage in open conversations, contribute your takeaways, and participate in a dynamic knowledge exchange. This is more than just networking; it's a chance to debrief, learn, and chart the course forward together. 1. Participants will share and articulate at least one key insight or learning acquired during the conference, fostering a collaborative environment for knowledge exchange 2. Attendees will actively engage in open discussions to identify and discuss specific challenges faced during the conference, promoting a shared understanding of common issues within the group. 3. By the end of the session, participants will collaboratively outline their personal action steps and intentions based on the insights shared and challenges discussed.	Teresa	Kobelt	Chief Innovation Officer	Ohio Provider Resource Association
Fri., May. 3rd 9:00am-10:00am Business, Finance and Operations Track	Session 20 Track Debrief	In this collaborative conference debrief session, you'll have a unique opportunity to connect with peers and dive into the insights gained during the event. This session is all about sharing key learnings, discussing challenges, and collectively identifying next steps post-conference. Engage in open conversations, contribute your takeaways, and participate in a dynamic knowledge exchange. This is more than just networking; it's a chance to debrief, learn, and chart the course forward together. 1. Participants will share and articulate at least one key insight or learning acquired during the conference, fostering a collaborative environment for knowledge exchange 2. Attendees will actively engage in open discussions to identify and discuss specific challenges faced during the conference, promoting a shared understanding of common issues within the group. 3. By the end of the session, participants will collaboratively outline their personal action steps and intentions based on the insights shared and challenges discussed.	Scott	Marks	Vice President	Ohio Provider Resource Association
Fri., May. 3rd 9:00am-10:00am Human Resources Track	Session 21 Track Debrief	In this collaborative conference debrief session, you'll have a unique opportunity to connect with peers and dive into the insights gained during the event. This session is all about sharing key learnings, discussing challenges, and collectively identifying next steps post-conference. Engage in open conversations, contribute your takeaways, and participate in a dynamic knowledge exchange. This is more than just networking; it's a chance to debrief, learn, and chart the course forward together. 1. Participants will share and articulate at least one key insight or learning acquired during the conference, fostering a collaborative environment for knowledge exchange 2. Attendees will actively engage in open discussions to identify and discuss specific challenges faced during the conference, promoting a shared understanding of common issues within the group. 3. By the end of the session, participants will collaboratively outline their personal action steps and intentions based on the insights shared and challenges discussed.	Christine	Touvelle	Director of Advocacy	Ohio Provider Resource Association

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Fri., May. 3rd 9:00am-10:00am Supervision and Customer Service Track	Session 22 Track Debrief	<p>In this collaborative conference debrief session, you'll have a unique opportunity to connect with peers and dive into the insights gained during the event. This session is all about sharing key learnings, discussing challenges, and collectively identifying next steps post-conference. Engage in open conversations, contribute your takeaways, and participate in a dynamic knowledge exchange. This is more than just networking; it's a chance to debrief, learn, and chart the course forward together.</p> <ol style="list-style-type: none"> <li>Participants will share and articulate at least one key insight or learning acquired during the conference, fostering a collaborative environment for knowledge exchange</li> <li>Attendees will actively engage in open discussions to identify and discuss specific challenges faced during the conference, promoting a shared understanding of common issues within the group.</li> <li>By the end of the session, participants will collaboratively outline their personal action steps and intentions based on the insights shared and challenges discussed.</li> </ol>	Rachel	Hayes	Director of Residential Services	Ohio Provider Resource Association
Fri., May. 3rd 9:00am-10:00am Closing Keynote	Session 23 The Power of a Promise	<p>Join us for an inspiring keynote speech by Alex Sheen, where he will delve into the heart of accountability, personal integrity, and the transformative impact that comes from following through on one's word. Drawing from his personal journey and the powerful stories of individuals worldwide who have been touched by the "Because I Said I Would" movement, Alex will explore the ripple effects of promises kept, not only on personal growth but also on society at large.</p> <p>Key Highlights:</p> <ul style="list-style-type: none"> <li>The Genesis of a Movement: Discover the deeply personal story behind Alex Sheen's commitment to promises and the legacy of his father that inspired the creation of "Because I Said I Would."</li> <li>The Power of Accountability: Learn how the simple act of keeping a promise can build trust, foster relationships, and create a strong foundation for personal and professional growth.</li> <li>Real-Life Heroes: Be moved by the extraordinary tales of everyday people who have changed lives, including their own, through the commitment to their promises.</li> <li>Call to Action: Alex doesn't just share stories; he invites each of us to become a part of something bigger. Learn how you can incorporate the principles of "Because I Said I Would" into your life and witness the profound impact it can have on the world around you.</li> </ul>	Alex	Sheen	Founder	Because I Said I Would