

Session 1, Monday, June 10<sup>th</sup> 9:00 – 10:00 a.m.**Driving Success with Data: A Consonus + Transforming Age PDPM Case Study**

*Janalyn Brown, Vice President of Operations and Anthony Laflen, Consulting & Data Analytics Director, Consonus Healthcare; Ryan Miller, Assistant Executive Director, Skyline; Jonathan Free, Regional Clinical Nurse, Transforming Age*

With the most significant change in skilled nursing reimbursement approaching, providers must understand the driving forces and how to position themselves for success. This session will cover strategies to face various alternative payment models the results real organizations are experiencing compared to a more traditional Medicare payment model. They will share case study examples of patients in both traditional and alternative payment models, best practices in laying the groundwork, testing and leveraging data in preparation for PDPM. Review critical tools needed for this more efficient model and discover tangible examples of how to achieve similar results in your market. *Focus: Financial Management*

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**Technology Planning and Strategies for Senior Communities**

*Mary Burris, CEO, SisAdmin, LLC*

How to invest in technology the right way, resulting in increased productivity and measurable results! *Focus: Design & Project Management, Financial Management, Leadership & Strategy, Management & Operations, Tech & Innovation*

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**What if Marijuana Were Completely Legal?**

*Pamela Kaufmann, Partner, Hanson Bridgett LLP; Gabriela Sanchez, Shareholder, Lane Powell PC*

**What if there were no legal barrier to allowing marijuana on your campus?** Marijuana dispensaries abound in "legal" states. The stigma associated with marijuana is dissolving. The FDA has approved cannabinoids for medical use, and the "farm bill" has legalized hemp production. Relief from conditions ranging from arthritis to glaucoma has been cited. Cannabis is available in gummies, pretzels and teas. And residents are demanding the right to use marijuana on-campus. Two attorneys who are veterans on this topic will explore how to protect resident safety and employ sensible risk management strategies if you opt to become a marijuana-friendly campus. *Focus: Public Policy & Legal Issues*

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**Promoting Play: Using the Arts and Intergenerational Connections to Encourage Creativity, Connections, and Socializing**

*Jen Kulik, Founder & CEO, Silver Kite Community Arts*

Let's play! During this session we'll learn about the positive benefits of engaging in play throughout the lifespan, engage in playful activities, and explore how the arts and intergenerational programs can foster and encourage residents to play - every day!

*Focus: Wellness & Life Enrichment, Partnership & Collaboration*

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**Behind The Curtain: A No-Holds-Barred Conversation with Residents and Prospects About How They Receive Your Advertising**

*Cynthia Thurlow Cruver, Principal, 3rdThird Marketing; Nancy Weinbeck, CEO, Bayview; Ralph Novak, Research Director, Brooks Adams*

What do age qualified seniors really think about what communities are selling and marketing?

This session will help senior living providers understand what today's consumers really want and how to better communicate your offerings to appeal to this audience and achieve greater lead generation and conversions. This includes a 60-Minutes-style anonymous panel interview and data from the Generations study, a nine-year study that reveals consumer sentiments about aging products and services. You'll see visual examples of how to market something people WANT versus marketing something people have to buy. *Focus: Leadership & Strategy, Management & Operations, Marketing, Philanthropy & PR*

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**What If Your BUILDING Was WELL?**

*Lisa Warnock, Associate, Chuck Archer, Associate and Lisa Sneddon, Interior Designer, LRS Architects*

What if your building could make everyone who lived and worked there HEALTHIER? Through air, water, nourishment, light, fitness, comfort and mind, it can. These are the tenants of the WELL Building Standard and it is revolutionizing the way people think about buildings. It marries best practices in design and construction with evidence-based medical and scientific research – the result being improved nutrition, fitness, mood, sleep patterns and performance of its occupants. The presenters will discuss how to create a built environment that improves nutrition, fitness, mood and sleep patterns as well as increase employee productivity, engagement and retention. *Focus: Design & Project Management, Wellness & Life Enrichment*

Monday, June 10th, Lunch – Keynote Guest

## Priorities and Insights

*Katie Smith Sloan, President & CEO LeadingAge*



Monday. Deep Dives 10:15 a.m.– 12:15 p.m (2 hrs)

## Today's Influential Trends and Their Impact on Senior Living Offerings

*Mary Muñoz, Senior Managing Director, Ziegler; Leslie Moldow, FAIA, LEED AP - Principal, Perkins Eastman*

Ziegler will present hot trends in the industry – the current healthcare sea change and its impact on skilled nursing environments; technology integration; construction and redevelopment; consumer preferences/change; demographics; and finance. Perkins Eastman will share new research on how senior living models may change in the future as a result of current “disruptors.”

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## What If We What If'ed Every Day?

*Christopher W. Ridenhour, CEO, Creative Engagement Officer, Consultant*

What if we “What If-ed” every day? What if the energy, teamwork and engagement portrayed on the website, truly defined the relationships across all shifts and departments? Imagine the levels of success our stakeholders would experience if every team member “embraced changed,” “owned problems,” and took “personal accountability” for their part in creating an extraordinary and inclusive community. Here’s the rub: Increased responsibilities, tighter regulations, and a workforce crisis saps the energy, enthusiasm and optimism from the strongest of us. Low morale, dispirited attitudes, and negative behaviors flavor many of our cultures.

Finally, a session that serves as the antidote to “burn out” and is designed to rejuvenate all professionals who have ever considered trading in their credentials for an airline ticket and butterfly net. Your well-being is calling, and it misses you! It’s time to recapture your passion and sanity through research-based best practices and real belly laughs. This highly interactive experience will challenge you like an honest friend and support your growth as a workplace champion with increased influence, courage and confidence.

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## Bullying Among Seniors: Out of the Playground and Into the Senior Living Communities

*Rubén Rivera-Jackman, Resident Services Director, Sustainable Housing for Ageless Generations (SHAG)*

Often when we hear the word bully, we immediately think of children and adolescents, but it is very real problem in the older adult population. Bullying is the human phenomenon of the strongest picking on the weakest. It is estimated that 10-20% of older adults experience some type of senior-to-senior aggression, usually verbal abuse. The actual numbers of older adults targeted are tough to tease out, because these acts often go unreported. This session is designed to increase and/or enhance your knowledge regarding the phenomenon of older-adult bullying, and outline strategies housing providers can adopt to create a safe environment for all residents while addressing the concerns of targeted individuals, as well as, holding the perpetrators accountable for their behavior. This session will include a didactic presentation, as well as, an interactive panel of leading housing experts who will facilitate a comprehensive dialogue on preventing and addressing bullying behaviors in older-adult continuum of care communities.

**Monday, June 10th 8:00 – 4:30 p.m. Library**  
*Schedule will be posted in the program*



**Silverado Memory Care Community** invites you to

## **The Virtual Dementia Tour**

*.....changing the perception of aging with Alzheimer's*

Alzheimer's is an emotional journey. It is difficult to fully comprehend the challenges that your loved one faces every day. Discover the realities of living with dementia while experiencing the overwhelming effects a person living with memory impairment feels when trying to perform everyday tasks.

The Virtual Dementia Tour will take you from beginning to late stages of the disease process. Unlike other virtual dementia tours, this comprehensive session encompasses tasks and exercises that are essential for professionals and caregivers to experience.

Tuesday a.m. \* Keynote Guest

## Senior Living: Facing the Innovation Imperative

Dan Hutson, Former Chief Strategy Officer



Our understanding of the impact of older adults is shifting, from "burden on society" to "fast-growing contingent of active, productive people who are working longer and taking the American economy in new directions" (The Longevity Economy, Oxford Economics/AARP). By 2032, the Longevity Economy—representing the sum of all economic activity serving the needs of Americans over 50—is projected to generate more than half of the U.S. GDP, employ nearly 100 million people and make up two-thirds of wages and salaries.

This opens up all kinds of exciting new opportunities for the senior living industry ... but only if we're prepared. Taking advantage of the Longevity Economy requires more than simply business as usual. Entire industries that have previously not seen people over 50 as their market will shift their attention to those we serve. Change is imperative. And innovation is the key.

In this keynote address, Dan Hutson will look at the current senior living market, the forces that are changing it, and how we might harness innovation to stay relevant and win in an exciting but increasingly more challenging environment.

Tuesday \* Deep Dives 2:30-4:30 p.m. (2 hrs)

## 7 Challenges Assisted Living MUST Get Right

Dr. Steven Fuller, Founder & President, Illumination Analytics

The first assisted living community was opened in Portland, Oregon in 1981 as a social model alternative to nursing homes. The underpinning of the social model is that care is predicated on maintaining a homelike environment and the nurturing of social relationships. Although the goal is to provide an independent experience that emphasizes quality of life above everything else, assisted living residents are inherently fragile and require robust support of a plethora of healthcare needs. The success of the social model emphasized in assisted living is challenged by a resident population of increasing frailty, disability, cognitive impairment, and medical complexity. This has created a greater demand for healthcare expertise and the call for a blending of the social and medical models – i.e. Integrated Care – to accommodate these demands.

"7 Challenges Assisted Living MUST Get Right" discusses 7 fundamental elements that must be managed successfully if assisted living is to continue to be a viable alternative to nursing homes. The speaker will introduce each challenge with a brief presentation, following which the audience is encouraged to share opinions and experiences and propose actionable solutions that can be implemented by their colleagues.

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## The Role of a Leader in Creating a Culture of Engagement

Seth Anthony, Sales, Marketing & Business Development Director, Holleran Research and Consulting

The presentation will be broken down into four half hour blocks – Seth will bring to the audience....

- Understanding employee engagement and the trends that we see;
- Understanding resident engagement and the trends that we see;
- What synergies exist between resident and employee engagement;
- Strategies and best practices that leaders can implement to boost engagement .

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## Designing a Compliance and Quality Metrics Dashboard

David Chen, General Counsel, Chief Compliance Officer, Rebecca Muld, Attorney and Corporate Compliance Manager, Law & Corporate Affairs; Brandi Smith, Quality Compliance Manager, CRISTA Senior Living

By now, many facilities have drafted a QAPI Plan in compliance with 42 CFR § 483.75. However, QAPI Plans without specifications on performance expectations, when corrective action is required, and reporting accountability are of little use to operations. With the growing number of externally reported measures, leaders can be overwhelmed and lose focus on what to prioritize. Join compliance and quality leaders from CRISTA Ministries in a discussion about *developing visual tools, including dashboards, to engage and communicate to all levels of staff and leadership regarding the QAPI program.*

Session 2, Tuesday, June 11<sup>th</sup> 10:30 a.m.**2019 Data Trends - What You Need to Know to Survive & Thrive***Craig Bettles, Project Manager, Consonus Healthcare*

Understanding your data is essential for SNF operations in 2019. In October 2019, the entire SNF landscape will shift with the rollout of PDPM. Payment categories will move from 66 different unique combinations of classifications to roughly 28,800 different combinations. CMS will be consolidating the number of MDS assessments and expanding the number and length of their quality measures. Additionally, payers and hospital systems are narrowing their networks and are looking for partners who can understand, and manage, their data. Explore data trends that will drive SNF management and gain knowledge to start a dialogue with their healthcare partners.

*Focus: Management & Operation*

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**Hiring for Keeps: Strategies to Retain Staff***Peter Corless, Executive Vice President, OnShift*

When properly engaged, employees do their best work, inspiring others and improving resident care and satisfaction. Organizations need to build a nurturing and rewarding culture to improve employee engagement and reduce turnover, which means evolving recruiting, engagement, and retention tactics to attract and develop talent.

*Focus: HR/Workforce*

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**What a Deeper Understanding of Your Engagement Data Can Do For You***Alex Bitoun, President & CEO, Sagely, Inc*

Learn about the importance of engagement data when providing wellness to your residents. Detailed strategies to measure engagement initiatives will be shared, a step required to truly understand the effectiveness and operational impact of engagement efforts. We'll talk about collecting data to improve operational efficiency and resident engagement. Together we'll interpret the data and make it actionable without requiring wellness engagement directors to become data scientists. A real-life example of a community will demonstrate how engagement technology was used to gain a deeper understanding of their residents and improve engagement and operational efficiency.

*Focus: Wellness & Life Enrichment*

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**What is an Integrated Design Team and How Can Your Community Benefit During Master Planning***Suzanne Pontecorvo, Principal, RiceFergusMiller Architects; Gregg Sloan, Founder and Chief Creative Officer, Amplified*

What if we could achieve more with new partners? How connecting to collaborate with new partners has created the next evolution of Master Planning. This partnership of teams who bring User Experience (UX) design and technology innovation, Architectural/ Interior Designers and Building Systems Solutions together. We will describe how working together early in this process will provide more thorough solutions and optimize the outcomes to be more strategic rather than reactionary. This innovative panel of experts from Amplified, McKinstry and RiceFergusMiller Architects presents our new process that creates a road map your Community can use to make Future Connections possible.

*Focus: Design & Project Management, Management & Operations, Tech & Innovation*

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**How to Integrate Technology Solutions as a Response to Industry Trends***Scott Collins, President & CEO, Link-age; Sarkis Garabedian, Director and Daren Bell, Senior Vice President, Ziegler*

This session is solely focused on the role that technology can play in providing solutions for today's senior living organization. This topic overview will include information on the latest senior living technology research, expert opinion, and provider examples of technology adoption.

*Focus: Tech & Innovation*

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**Diverse HighNetWorth Donors: Assessing the Emerging Philanthropic Landscape: What if the Diversity of our Sector Matched the Diversity of America?***Karen Rotko-Wynn, Executive Vice President, The Alford Group*

The demographics of our nation are becoming more diverse – and yet the demographics of philanthropy in our nation remains largely unchanged. As a sector, we must crack the code to diversifying the philanthropic donor base. The Alford Group has partnered with the IUPUI Lilly Family School of Philanthropy to release a report that examines the giving patterns, priorities, and attitudes of America's diverse high net worth donors, in particular, among African Americans, Asian Americans, Hispanic/Latinos and the LGBT community. This new information will supply you with valuable knowledge about donor attitudes and practices for the 21st century philanthropic landscape.



Session 3, Tuesday, June 11<sup>th</sup> 1:15 p.m.

**Backstage Pass: A Behind The Scenes Look at Events That Distinguish Your Community and Attract Qualified Prospects**

*DeAnne Clune, Principal & Consultant and Deborah Elliott, Senior Living Consultant, Zola Consulting; Angela Johnston, National Sales Director, Heritage Ministries*

What if... your marketing events could be more creative, more organized, easy to implement and achieve better results? In this session, participants will learn how to take their marketing events to the next level and maximize their effectiveness. Attendees will also be inspired to try new approaches that help separate them from the competition. If you're involved in event planning at your community or organization, you won't want to miss this session!

*Focus: Marketing, Philanthropy & PR*

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**Coaching for Success**

*Alex Candalla, Executive Director; Colleen Wojciechowski, HR Director; Naniofa Poulivaati-Mounga, Director of Resident Engagement, Wesley Des Moines*

Coaching for Success offers unique strategies for building alignment with team members who are underperforming. This program will help team members take personal responsibility for their behavior, and as leaders we help problem employees become productive players. This program offers a complete program for mentoring, building superior team member performance and coaching employees that is proven successful in handling performance issues such as absenteeism, bad attitudes and poor performance.

*Focus: Leadership & Workforce*

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**Cyber Attack – Are You Ready? An Organizational Ransomware Tabletop Exercise**

*John DiMaggio, Co-Founder & CEO, Blue Orange Compliance*

Cyber attacks can happen to any organization. These attacks can affect residents, employees, management teams and Board of Directors. Prevention is important, however preparing an organization for a potential event is equally important. This session will cover how an attack can affect your organization by simulating a Ransomware attack, and by using a tabletop exercise to demonstrate the need for an effective incident response plan. *Focus: HR/Workforce, Management & Operations, Tech & Innovation*

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**Board Governance – How to Manage an Effective Board**

*Jeanette Kurtz, Not-for-Profit Director & Partner, Mueller Prost CPAs + Business Advisors*

In this 60 minute presentation, attendees will learn the most effective way to build and manage a board. Strategies and tactics provided will ensure the organization continues to grow while keeping board members and volunteers engaged.

*Focus: Leadership & Strategy*

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**What if We Started a Social Revolution?**

*Kristine Theurer, PhD, President, Java Group Programs Inc*

What if we overturned social calendars filled with entertainment and distraction and replaced them with endless opportunities to connect and help others? We examined an innovative peer support-mentoring intervention in which volunteers and residents formed a team, received training, and paired up to visit lonely residents. We found significant reductions in loneliness and depression among participants, and a 60% increase in participation. What if this approach starts a social revolution? Come experience the mentoring program and find out if it helped residents build meaningful relationships, find purpose and make life better for themselves and others. (It did and it does.)

*Focus: Wellness & Life Enrichment*

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**Legislating Senior Living: National Trends, Impacts and Advocacy**

*Nataša Honrine, Sr. Compliance Analyst, Life Care Services*

Legislation affecting our industry is happening fast and furious. Many providers are just managing to keep up with new laws in their own state. This session takes the audience outside of their in-state perspective and further on the horizon with a summary of legislative topics trending in other state legislatures affecting senior living. This session focuses on issues with high impact on provider operations being debated and passed in other states. Examples of cases discussed will include Granny Cam laws, emergency preparedness bills, union backed proposals to raise staffing ratios, and proposed laws related to life plan communities.

*Focus: Leadership & Strategy, Management & Operations, Public Policy & Legal Issues*

Sessions 4, 5 & 6, Wed. June 12<sup>th</sup> 8:30 a.m. Noon

## **My Plan Is Better Than Your Plan: A Lively Discussion on Memory Care Design Options**

*Dr. Margaret Calkins, President, IDEAS Inc.; Lisa Warnock, Associate and Charles Archer, Associate, LRS Architects*

What is the BEST way to design a supportive Memory Care environment? What are the MOST important considerations? Not everyone agrees and there are pros and cons to the multiple community styles to be considered. The presenters each bring a different level of experience and perspective to an informative and lively debate and overview of the Open Plan, Household, Neighborhood and Corridor Plan options. Additionally, various interior apartment types and styles, and supportive interior finish and furnishing considerations will be discussed. Attendees will learn when and why to choose one design concept over the other for their community.

*Focus: Design & Project Management*

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## **Going Beyond Age and Income: Understanding Your Community's Psychographic Profile**

*Derek Dunham, Vice President Client Service, Varsity; Roberta Voloshin, Marketing Corporate Director, United Methodist Communities of New Jersey; Martin Pacino, Sr Director of Research Insights, The MSR Group*

Inherently each community in the marketplace strives to provide a welcoming and caring environment. However, going beyond the demographics (e.g., age, income, geography) to understanding the psychographic profiles (personal values and interests) can provide opportunities for deeper connections and more efficient sales processes. A better understanding of WHO is attracted to WHAT you offer will create a fulfilling experience for your team and prospects alike.

*Focus: Marketing, Philanthropy & PR*

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## **The REAL Cost of Turnover - Leveraging Retention to Improve Margin**

*Bob Lane, Director, BKD CPAs & Advisors*

Turnover of staff, particularly front-line caregivers, is one of the largest issues facing providers today, both from a clinical and a financial perspective. This session will utilize evidence-based data, along with user-friendly tools to arm participants with needed information, and will give leaders specific direction and proven strategies to enable them to return to their organization ready to make positive changes.

*Focus: HR/Workforce, Leadership & Strategy, Management & Operations*

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## **Capital Reserve Budget Planning for Maintaining Existing Facilities and Its Role in Acquisition of New Facilities**

*Doug McMillan, President, zumBrunnen Inc.; Dayle Krahn, Vice President of Property Maintenance & Development, Baptist Housing*

Senior living communities with aging facilities face special challenges in budgeting for the future. As buildings age, expenses can compound rapidly, and Owners can find themselves without adequate funds to fix problems. Capital Reserve budgeting and planning is a significant tool in keeping communities up to par, but is also useful for Owners who are in the process of acquiring existing facilities. This session focuses on how Baptist Housing successfully utilizes capital budget planning to keep their facilities adequately funded, as well as how they approach the acquisition of facilities as it relates to the physical assessment of the facility.

*Focus: Financial Management, Leadership & Strategy, Management & Operations*

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## **Marketing & Culinary: Fully Baked – There's No Other Way To Do It!**

*Shawn Boling, Executive Chef, Culinary Coach; Nancy Weinbeck, CEO, Bayview; Cynthia Thurlow Cruver, Principal, 3rdThird Marketing*

CFO's will love this session because it takes your biggest budgetary department, culinary, and creates synergy with your money-maker, marketing. This session will walk you through line-by-line steps you can begin taking right away to create unity with your culinary, (residential services too) and marketing departments to positively impact the bottom line.

*Focus: Financial Management, HR/Workforce, Dining, Wellness & Life Enrichment, Leadership & Strategy, Management & Operations, Partnership & Collaboration*

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## **Getting The Most From Your Rehab Team: Impacting Five Star Quality Reporting**

*Diane Dismukes, Regional Clinical Director, O.T. and; Ravinder Hunjan, Regional Clinical Director, O.T., Genesis Rehab Services*

As consumers and other stakeholders search for high quality and value-based care, Five Star Ratings are one measure utilized to compare facilities. Physical, Occupational and Speech therapy services are integral interprofessional team members in establishing clinical programs that positively impact health outcomes and patient satisfaction (Gilbert, Yan & Hoffman, 2010). Learn how to optimize rehab from admission through discharge in decreasing complications and efficiently achieving quality outcomes.

*Focus: Care and Services*

## **Strategic Planning: Pie in the Sky to Grounded Application**

*John Harned, Director, BKD CPAs & Advisors*

With today's chaotic operating environment and strained payment systems, it's time to get clear about your identity, mission and lifecycle progression over the next five years. A focus on mission during this recommitment, and possibly reinvention, will achieve the best outcomes for your residents and employees. Strategy, namely including cost reduction and revenue creation, makes the mission. Whether a student, emerging leader or experienced professional behind the technologically advancing learning curve, this session will bring clarity for vision. *Focus: Financial Management, Leadership & Strategy, Management & Operations*

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## **Take Care of Your Staff -- The Rest Will Follow**

*Lisa Waisath, Director, Keiro Northwest Nikkei Manor*

Most managers think their job is to take care of their residents when really it is to take care of their staff so they can take care of the residents. What if we focused on supporting staff in a holistic way so they could do their jobs in the most excellent way possible? In this session, you'll learn how focusing your energy on your employees can boost employee morale, reduce turn-over, enhance teamwork, build resilience, improve resident care, and lead to increased resident & family satisfaction.

*Focus: HR/Workforce, Leadership & Strategy, Management & Operations*

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## **Maximizing Your Waitlist For Today's Vacancies and Tomorrow's Masterplan**

*Kristen Crawford, Marketing Director, Transforming Age; Don Warfield, Sales and Marketing Director, Skyline*

Not only a tool for filling vacancies, a deep waitlist can help you plan and innovate to meet the needs of tomorrow's residents. Don Warfield, Sales and Marketing Director at Skyline will partner with Kristen Crawford, from Transforming Age to share the story of the SkyClub, Skyline's priority reservation waitlist which totals over 250 members. Together they will share proven strategies to build and nurture your waitlist: focus groups, market research, segmentation, digital tactics, exclusive events, and priority access. Learn how the SkyClub grew into a goldmine that is now delivering record-setting presales for Skyline's expansion, The Olympic Tower.

*Focus: Marketing, Philanthropy & PR*

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## **Fraud: A Risky Business**

*Victoria Kitts, Audit Senior Manager, Clark Nuber PS*

What if you could prevent fraud in your organization? Learn the who, what and how of internal fraud, with data-driven strategies to implement prevention controls and reduce your organization's risk of fraud.

*Focus: Financial Management*