

THE GREATER GOOD



Strategies for Building Sustainable Organizations

In collaboration with Diamond Sponsor Ziegler, LeadingAge Washington has developed a one-day program that will address some of the greatest challenges facing aging services and housing providers, offering sustainable strategies for responding to these challenges.

Conversations and information presented throughout the day will be founded on observational and data-driven trends in senior living providing a common understanding of our landscape. This event will address all segments and opportunities for sustainability within the spectrum of aging services, including skilled nursing, housing, PACE, adult day, assisted living and Life Plan Communities.

Prior to the COVID pandemic, housing, care and service providers for older adults were beginning to consolidate, with an increasing number of transactions over the past ten years. COVID accelerated this activity, as providers across the country saw increased stress, especially in skilled nursing. Additionally, areas of operating weakness were magnified during COVID; labor shortages were magnified as well, and in some cases, employees are not coming back. These factors have led to financial stress across many organizations stemming from concurrent depressed revenue and increased expenses, especially salary and benefits.

Some organizations are able to maneuver through these troubled waters to improve profitability. Other organizations have opted to reposition their portfolios, divesting of non-core assets or reducing the size/closing certain levels of care. Some weaker organizations have asked to join stronger organizations. Others have entered into strategic partnerships to diversify service mix, share risk, bring outside perspective, or bring new management. Still others have faced bankruptcy or closure.

2023 Fall Leadership Summit
Tuesday, October 17th
Embassy Suites, Seattle Airport

LeadingAge™
Washington

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AGENDA

- 8:30 a.m.** **Registration and Continental Breakfast**
- 9:00 a.m.** **Welcome and Senior Living Trends**
Mary Muñoz, Senior Managing Director, Ziegler
Sarkis Garabedian, Managing Director, Ziegler
Daren Bell, Director, Ziegler
- 10:00 a.m.** **Break**
- 10:15 a.m.** **Self-Assessment and Sustainable Organizations: Building Blocks**
Questionnaire developed by Ziegler
Mary Muñoz, Senior Managing Director, Ziegler
- 11:15 a.m.** **Taking Action if You Are Not Sustainable: Part 1**
Sheri Peifer, CEO, Eskaton
Eric Sholty, President/CEO, Pacific Retirement Services
David Knight, President, GSI
- 12:00 p.m.** **Lunch**
- 1:00 p.m.** **Taking Action if You Are Not Sustainable: Part 2**
Sheri Peifer, CEO, Eskaton
Eric Sholty, President/CEO, Pacific Retirement Services
David Knight, President, GSI
- 1:30 p.m.** **Growth Through Joint Venture & Partnerships**
Jeff Cohen, CEO, Kline Galland
Kim Hoppe, CFO, Brio Living
- 3:00 p.m.** **Break**
- 3:15 p.m.** **Panel Discussion and Q&A**
Facilitator: Mary Muñoz, Senior Managing Director, Ziegler
Jeff Cohen, CEO, Kline Galland
Kim Hoppe, CFO, Brio Living
David Knight, President, GSI
Sheri Peifer, CEO, Eskaton
Eric Sholty, President/CEO, Pacific Retirement Services
- 4:00 p.m.** **Wrap Up & Adjourn**

EVENT INFORMATION

EDUCATION FOCUS

After these sessions, attendees will:

- Grasp the current landscape and future trends in the aging services field.
- Understand potential steps to take if your business model is not sustainable.
- Learn how various organizations made different choices to grow or change and why.
- Gain insights into a bankruptcy case and what happens to buildings and resident contracts.

TARGET AUDIENCE

This program is designed for senior leaders, executive directors, and board members of LeadingAge Washington member organizations. The content will be relevant for all member types across the aging services continuum.

EDUCATION CREDITS

Up to 6 CE hours are available.

ACCOMMODATIONS

A courtesy block of rooms will be available at the Embassy Suites for a rate of \$169/night. Please reference Group Code 912 when booking.

SESSION HANDOUTS

We are green. When you check in you will receive a printed agenda that will include a link to access the materials online.

OVERALL CONFERENCE EVALUATION

We are green. Following the event you will be emailed an online conference evaluation. We encourage you to complete the “quick & easy” evaluation. Your feedback is very important to us!

REGISTRATION

- LeadingAge WA Provider Member: \$199/attendee
- LeadingAge WA Provider Member Board Member/Trustee: \$179/attendee
- LeadingAge WA Business Member: \$299/attendee
- Nonmember: \$349/attendee

QUESTIONS

Need more information? Please reach out to Lynn Monaghan at lmonaghan@leadingagewa.org

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