



2019 MASSACHUSETTS SENIOR LIVING SYMPOSIUM

LeadingAge Massachusetts and Ziegler are pleased to announce the 11th Annual Senior Living Symposium to be held on Thursday, March 14 at the Crowne Plaza in Natick, Massachusetts. The 2019 Senior Living Symposium remains a one-day event designed to provide attendees with an update on current trends in senior living, ranging from finance to operations to legal considerations and other relevant topics. The Senior Living Symposium also provides attendees ample opportunity to mingle with colleagues and industry professionals. The topics are intended for CEOs, CFOs, board members and other key personnel. New this year, the symposium will feature a lunch-time tech demo featuring some of the latest technology for aging services.

YOU'RE INVITED!

MARCH 14, 2019

CROWNE PLAZA

1360 Worcester Street | Natick, MA 01760

Completely renovated, the Crowne Plaza Boston-Natick is situated 25 minutes from downtown Boston and Logan Airport in the corporate and retail hub of MetroWest Boston in Natick.

We hope to see you there!

**FOR ADDITIONAL
INFORMATION, CONTACT:**

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Massachusetts



Ziegler

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MARCH 14, 2019

2019 Massachusetts Senior Living Symposium

CROWNE PLAZA | NATICK, MASSACHUSETTS

PROGRAM DETAILS

- Thursday, March 14, 2019
- Registration starts at 8:00 a.m.
- Program runs from 8:30 a.m. - 4:45 p.m.

Location

Crowne Plaza
1360 Worcester Street, Natick, MA 01760

Space Limitations

Due to the unique nature of this workshop, we can accept a limited number of registrants. The small size of the group will allow for a greater level of discussion among the participants and provide the maximum benefit for all attendees. Therefore, don't delay in registering; we anticipate these openings will fill quickly.

Cost

LeadingAge MA Member Organizations:

- > Trustees, Board Members or Residents of
LeadingAge Massachusetts Member Organizations
- > LeadingAge Massachusetts Member
- > Non-LeadingAge Massachusetts Member Rate

\$ 90 per person
\$ 125 per person
\$ 250 per person

CEUs

Six CEUs will be offered for the following area:

- Nursing Home Administrators (NHAs) with deemed status provider #NH-09015-006

Six CEUs will be offered for the following area:

- Certified Public Accountants (CPAs) as B.C. Ziegler and Company is registered with the National Association of State Board of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. Please see the conference agenda for more details.

Registration

On-line registration is the preferred method. Visit <https://www.leadingagemass.org/SLS2019> to register on-line.

Driving Directions

For detailed driving directions, please visit www.LeadingAgeMA.org under the Senior Living Symposium link.

Reception

Following the Symposium, all attendees are invited to a wine & cheese gathering sponsored by Ziegler.

Questions or Need More Information?

Please contact Lynn Monaghan with any questions via email at lmonaghan@leadingagemass.org.

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AGENDA

THURSDAY, MARCH 14 | CROWNE PLAZA, NATICK, MA

8:00 - 8:30 am

Registration

8:30 - 8:45 am

Welcome & Opening Remarks*Speakers: Elissa Sherman (LeadingAge Massachusetts), Keith Robertson (Ziegler)*

8:45 - 10:15 am

The 2019 State of Senior Living & Senior Living Capital Markets

This opening session will set the stage for the rest of the day's agenda, providing an overview of key strategic trends in the senior living sector within a framework of the national economy, the capital lending environment and aging services climate nationally and in the state of Massachusetts.

Objectives:

1. To learn about the key operating and financing trends in the not-for-profit senior living sector
2. To highlight the key trends, disruptors and catalysts impacting senior services
3. To understand how national and regional trends are impacting Massachusetts providers and how they can plan accordingly

Speakers: Dan Hermann, Lisa McCracken, Keith Robertson (Ziegler)

10:15 - 10:30 am

Break

10:30 - 11:45 am

KEYNOTE – Opportunities in Healthy Aging and System Integration

In the next decade, a rapidly growing population of older adults age 80 and older will live longer than ever before. As we approach the very old age of baby-boomers, our systems are unprepared and strained. We face the perfect storm of too few resources, inadequate infrastructure, and high need populations. The good news is that the private and public sectors are starting to respond. In this keynote address, Anne Tumlinson will share with you five important trends in innovation across the health and long-term care landscape and how your organization can participate.

Objectives:

1. Understand aging demographics and the experience of late-life disability in America
2. Hear about new opportunities to receive reimbursement for non-medical services from Medicare Advantage payers
3. Learn how some organizations are financing new healthy aging programs by taking risk for healthcare spending
4. Consider certain investments as your organization prepares to deliver services and housing to this population

Speaker: Anne Tumlinson (Anne Tumlinson Innovations)

11:45 am - 1:15 pm

Lunch With Tech Demo

Meet with representatives from tech companies to learn about some of the latest technology impacting aging services.

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AGENDA

BREAKOUT SESSIONS

1:15 - 2:15 pm

Senior Living Financing in 2019 – Provider Case Studies

Senior living providers have been quite active in recent years with borrowing capital to fund campus expansion and repositioning projects and to also refund debt to lower the cost of capital. This session will highlight providers who have recently accessed capital and will delve into the rationale for selecting certain mechanisms (bank or bond) and the benefits/drawbacks associated with various approaches.

Objectives:

1. To understand capital sources and structure options for senior living providers.
2. To delve into case studies of recent financings to understand how to best align capital structure with financing objectives.
3. To gain insight into alternative sources of capital and financing structures.

Speakers: Fred Erdman (Wake Robin), Kevin Goyette (The RiverWoods Group), Keith Robertson (Ziegler)

1:15 - 2:15 pm

Operating & Growing Effective HCBS Platforms

Many providers are looking to grow non-housing revenue and exploring HCBS platforms is a common strategy. This session will give guidance for organizations looking to develop or enhance home health, home care or hospice service lines and will highlight examples of providers who have diversified outside of seniors housing offerings.

Objectives:

1. To understand the scope of service options for HCBS platforms
2. To highlight the keys to successful home health and hospice operations as well as mistakes to avoid.
3. To hear feedback from providers who have established and grown their own HCBS service lines.

Speakers: Nancy King (Senior Options), Christopher Sintros (Deaconess Abundant Life Communities), Jon-Paul Venoit (Masonicare)

2:15 - 2:30 pm

Break

BREAKOUT SESSIONS

2:30 - 3:30 pm

Project Development & Construction Considerations for 2019

There is a great deal of activity in senior living with campus renovation and expansion projects as well as select new campus developments. Project execution has been pressured recently due to workforce shortages in the construction field, increasing material costs and negative impacts from government-imposed tariffs. This session will highlight how to execute a successful construction and development project, taking all of these factors into consideration.

Speakers: Chris Floyd (CE Floyd), Jim Freehling (Brookhaven at Lexington), Erik Dalen (OnePoint)

2:30 - 3:30 pm

Strategic Recruitment and Hiring Issues

Hiring decisions are some of the most important decisions an employer can make. Everyone wants to avoid a “bad hire,” yet there are limits to what an employer can say and do during the hiring process. The risks are magnified in a tight labor market, where employers are competing for scarce talent. In this session, we will explore the legal requirements, pitfalls to avoid, and best practices to help maximize the chances for successful hiring. Topics will include lawful/unlawful interview questions, background checks, drug testing, diversity and inclusion initiatives and compensation negotiations among others.

Objectives:

1. Learn about legal pitfalls to avoid during the recruitment and hiring process
2. Learn about proper documentation for applicants and new hires
3. Learn about changes in Massachusetts state laws (including around marijuana utilization and equal pay) that impact hiring

Speaker: Elizabeth Monnin-Browder & Pete Moser (Hirsch Roberts Weinstein LLP)

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3:30 - 3:45 pm

Break

3:45 - 4:45 pm

Closing Panel – Governance

We will close out the Symposium with board member representatives from various member organizations. Learn what is top of mind for senior living boards, the direction their organizations are heading, and how they perceive the role of governing boards in setting the strategic direction of the organization.

Objectives:

1. To hear from the perspective of the senior living board member
2. To clarify the roles and expectations of not-for-profit boards
3. To gain insight into the strategic direction of proactive, healthy senior living organizations.

Speakers: Ken Blake (Masonic Health System), Stephen Corrigan (Loomis Communities), Mike McConnell (Pleasant Springs)

4:45 pm

Wrap-Up & Closing Remarks

Speakers: Keith Robertson (Ziegler), Elissa Sherman (LeadingAge Massachusetts)

5:00 pm

Wine & Cheese Social for Attendees