

2017 FINANCE + STRATEGY SYMPOSIUM

NOVEMBER 30, 2017 | HOMEWOOD AT FREDERICK

AGENDA

THURSDAY, NOVEMBER 30, 2017

8:00 – 8:30 am **Registration**

8:30 – 8:35 am **Welcoming Remarks**

Speaker: Jill Schumann (LeadingAge Maryland)

8:35 – 9:45 am **The 2017 State of Senior Services**

This opening session will set the stage for the other sessions throughout the day by providing an overview of key trends in the senior services sector within a framework of the national economy and senior living climate in the state of Maryland. Specific focus will be on growth in the sector, from expansions and new community development, to the ongoing evolution of home and community-based services and expansion across the services and consumer income spectrum. Attendees will also hear an overview of the capital markets for the not-for-profit senior living sector.

Speakers: Amy Castleberry & Lisa McCracken (Ziegler)

9:45 – 10:00 am **Break**

10:00 – 11:00 am **What You Don't Know CAN Hurt You- Cybersecurity for Senior Living**

Technology experts generally agree that it is not an issue of whether or not an organization will have a data breach, but a matter of the subsequent handling of the situation. Senior living organizations certainly need to invest accordingly to insure the security of the information they possess, but also need to commit to ongoing staff training that increases awareness of the role humans play in data breaches. This session will frame the issue and will provide guidance on best practices for senior living organizations.

Speakers: David Baker (The Asbury Group), Keith Mouldsdale (Whiteford Taylor Preston)

11:00 am –
12:00 pm

The War for Talent: How to Be a "Talent Magnet"

It is evident that one of the greatest challenges for today's senior living organizations is related to workforce recruitment and retention. While much is being talked about regarding front-line staff and healthcare staff shortages, challenges are present at all levels within the sector. This session will highlight promising practices and will focus on what will be required of not-for-profit leaders in the future.

Speakers: Todd Owens & Michelle Pagano Heck (Nonprofit Talent)

12:15 – 1:15 pm **Lunch & Community Tours**

1:30 – 2:30 pm **Campus Repositioning & Community Growth: Two Case Studies**

We know from various industry ratios that the average age of physical plant has crept up in recent years. Particularly given the changing preferences of the Baby Boomers and the strong relationship between curb appeal and occupancy, it is more important than ever for communities be proactive with community repositionings, expansions and new development. This session will highlight two providers who have reinvested in their communities and have even expanded with new locations in recent years.

Speakers: Marvel Adams (Collington), Candace McMullen (Homewood Retirement Centers)

2:30 – 3:30 pm

Senior Living Board Panel

This closing general session will share the insights and experiences of those in the true leadership positions within the organization: the board of directors. What are board members seeing as top priorities in today's current environment? What do they see as the biggest threats and opportunities looking ahead? These questions and more will be addressed during this facilitated panel discussion.

Speakers: Campbell Killefer (Roland Park Place), Melissa Peters (Comprehensive Housing Assistance, Inc.), Clinton Pettus (Broadmead)

3:30 pm

Wrap-Up & Closing Remarks

Speakers: Jill Schumann (LeadingAge Maryland)

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