

A photograph of a multi-story retirement community building with beige siding, white trim, and multiple windows. A large, diagonal orange band with a white dot pattern runs across the image from the top right to the middle left. The bottom left corner shows a paved area and some greenery.

Retirement Communities Summit

October 10 - 11, 2023

**The Neighborhoods at Acacia Village
2160 Bleecker Street; Utica, NY 13501**

Join your colleagues for this exclusive Summit designed to provide leaders of market-rate retirement housing and communities in New York State with time to strategize for future direction, learn about key topics influencing the field and operations, review market trends and network with peers.

*This free Summit has limited spaces. **Don't miss your seat, register today!***

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AGENDA

Tuesday, October 10th

10:15 – 11:15 a.m.

Registration Opens, Optional Tours of Community

11:30 a.m. – 12:30 p.m.

Navigating the Future of Senior Living: Trends, Insights, and Opportunities for New York's Retirement Communities

Join NIC's Ryan Brooks as he unpacks the latest data in senior living and provides actionable insights that will help your organization make informed decisions for success in today's complex market.

Delve into the fundamentals, from senior housing occupancy trends and recovery, net absorption, construction activity, and inventory growth, to transaction volume, asking rents, and beyond. Explore the outlook for middle-income seniors, learn more about the increasing behavioral health needs of today's older adults, and gain the data-driven knowledge you'll need to lead the industry through current and future market shifts during this comprehensive session.

*Ryan Brooks, Senior Principal, Healthcare Strategy
National Investment Center for Seniors Housing & Care (NIC)*

12:30 – 1:00 p.m.

Lunch

1:00 – 2:00 p.m.

Elevating Engagement in the Midst of Trauma

Do you know your staff well enough to recognize when they show up differently? Are you able to identify when their patterns of behavior shift and how that can disrupt organizational performance? Today's employees expect to be seen and treated as whole people, and it is becoming increasingly challenging to compartmentalize work and non-work disruptions. Failure to initiate dialogue and offer appropriate support is something that can impact their work productivity and overall wellness.

In this interactive session, you will better learn how to recognize the trauma your people may be facing in their personal or professional lives, plus affordable resources that can be leveraged to center employee well-being and, in turn, elevate engagement, productivity, and mission impact.

Shelbie Webster, Senior Consultant, Nonprofit HR

2:00 – 3:00 p.m.

How To Take Advantage of Tech to Boost Your Revenue

There's no shortage of tech available on the market for senior living. Everyone has something to offer their communities that will change their life. But how do you weed through the slick sales pitches to take advantage of tech in a way that will increase your census revenue?

Like many things in life, it's simple but not easy. This session will cover 3 specific areas that move the revenue needle: generating qualified, nurtured leads; doubling conversion rates through follow up automation; and streamlining processes and costs.

In today's fast-paced market, with staff juggling more responsibilities and pressures than ever, it can be too easy to drop the ball and, unfortunately, 80 percent of people who inquire fall through the cracks because of follow-up failure. Learn how digital marketing and sales automation technologies can streamline the "resident recruitment" process and maximize the impact of your staff. Plus, discover new lead management strategies designed to help you find, nurture, and manage leads like never before.

Mona Hilton, CEO, Advantage Anywhere

3:00 – 3:15 p.m.

Break

3:15 – 4:15 p.m.

Meeting Changing Resident Expectations in Dining

The dining experience is fundamental to the quality of life and satisfaction of residents. This session will explore new trends in dining to meet the changing needs and wishes of the people we serve. During the discussion, we will also touch on different payment plans, how they are operationalized, and how they can translate to customer satisfaction.

Brett Carey, District Manager Sodexo Seniors, Sodexo

4:15 – 5:15 p.m.

When to Seek Help and Accessing Mental Health Services

This session will provide information about signs that additional mental health support is needed for residents with a special focus on how symptoms are exhibited in older adults. Mental Health providers will share real world examples based on their work, explaining how depression, anxiety, and loneliness can present in older adults and indications that residents may need additional evaluation and connection with services. Presenters will also discuss the mental health service system, where to start in accessing services, and programs that offer modalities and components that speak to the preferences and needs of older adults with co-occurring long term care needs.

Karen Choens, LMSW, Program Manager Long Term Care Policy, Office of Mental Health, Adult Community Care

5:30 – 7:30 p.m.

Cocktail Party and Dinner at The Neighborhoods at Acacia Village

Wednesday, October 11th

9:00 – 9:30 a.m.

Breakfast

9:30 – 10:30 a.m.

Purpose Driven Life: Attracting the Next Generation Experience in Senior Housing

Successfully repositioning a senior living community requires unique vision, creative marketing strategies, quality care delivery and sound financial practices. This session will look at the accelerating changes in resident expectations, economics, financing, and market trends – and introduce new ideas

and opportunities to redefine community and enhance residents' lives. Utilizing current examples in New York along with other cases, we'll explore the various tools for full integration of your short- and long-term planning to attract younger seniors into housing and retirement communities. Find out how these plans are interrelated and how they can positively affect your ability to maintain and expand your mission.

Attendees will: 1) Study current trends and new directions for the senior living industry; 2) Discover how a NY provider and their planning partners are developing innovative solutions and how cues were taken from the hospitality industry to successfully brand their communities; and 3) Learn how to create livable spaces suitable for seniors that are appealing and impactful for all levels of care.

Rob Raffle, Executive Director, Masonic Care Community, Janice Maloney, Principal, Sawgrass Partners and J.D. Landis, Senior Associate, SFCS Architects

10:30 – 11:30 a.m.

Repositioning a Community to Lay the Foundation for a Successful Expansion

ClarkLindsey is a community that has been a vital part of the Champaign/Urbana, Illinois market for 44 years. The leadership identified an opportunity to reposition the community for future growth and success. The community refreshed its brand identity, embarked on an expression of interest campaign, and put tools in place to help sell the expansion and convert the priority members to depositors.

Learning objectives include outlining a successful approach to repositioning a campus; examining the tools (including a virtual sales platform) necessary for an efficient expansion; and assessing what went well and what could be improved.

Derek Dunham, Vice President Client Services, Varsity

11:30 – 11:45 a.m.

Break

11:45 a.m. – 12:45 p.m.

Shorter Sales Cycles with Financial Solutions

Senior living prospects often delay moving to a community because they face innumerable financial questions – questions they may be reluctant to discuss or even share with the community's Executive Director or Sales Director because finances are so personal. We often talk about the length of our prospects' sales cycle: Could part of that length be due to the "How do I pay for this?" question?

Today, having a Financial Resource Office with a wide array of financial solutions and moving resources is no longer optional, but a must-have to help prospects work through their financial questions and decide the best way to move forward. However, there's a right way and a wrong way to implement such an Office. Join us as we review case studies of other industries and of senior living providers who successfully incorporated a Financial Resource Office into their operations, resulting in shorter sales cycles and higher incremental move-ins.

Elias Papasavvas, CEO, and Karen Nelson, EVP of Customer Care, Second Act Financial Services

12:45 – 2:00 p.m.

Reflection Roundtable/Lunch

Working lunch! Review key takeaways, share the most impactful and thought-provoking insights from the day's sessions, and draw on the diverse expertise of your peers during this interactive roundtable discussion designed for you to contribute, learn, and grow.

2:00 – 3:00 p.m.

Transforming the Community of Yesteryear to the Community of Tomorrow

The 78- to 82-year-olds of the 1980s, 90s or 2000s were very different from today, and those of 2030 will differ even more. Any community built or repositioned a decade or more ago reflects the trends and consumer preferences of that time and are outdated, if not outright opposite of what tomorrow's consumer desires. Even full occupancy communities feel the disconnect between apartment designs, dining options, program offerings and many other factors younger prospects are demanding. Recognizing boomers are different is easy. A community's long-term viability, however, depends on quantifying and preparing for those differences. To leapfrog into viability for the years ahead, leaders can arm themselves with specific market and consumer data that drive decisions ranging from refined residence strategies to reimagining a philosophy of wellness, social connection and self-fulfillment. This presentation shares examples of communities that have successfully undergone this transformation, and how they did it.

Attendees will: Understand how consumer interests and expectations are evolving, and how senior living communities are adapting to meet those expectations; understand how to align wellness, dining and social connectivity strategies for an overall vision for resident self-fulfillment; and understand the most important information to gather on a market, including demographics and competitive insights, to drive a master planning process.

Rob Love, President & CEO, Love & Company

3:00 p.m.

2023 Retirement Communities Summit Concludes

Registration

Although the Retirement Communities Summit is free to market-rate senior housing and communities, **registration is required**. Space is limited, please notify us by 10/4/2023 if you are unable to attend so that someone else may take your spot. Send your cancellation to Earl Gifford at egifford@leadingageny.org. **Click the link below to register.**

REGISTER NOW

Session Material

All session materials will be electronic. Before the Summit you will receive a link to the materials that you may download to the device of your choice. Materials will remain on our website after the program for your convenience.

Hotel Accommodations

Hampton Inn Utica
172-180 North Genesee Street
Utica, NY 13502

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