



SENIOR LIVING SYMPOSIUM

October 15–17, 2019

The Ritz-Carlton Golf Resort, Naples

2600 Tiburon Drive

Naples, FL 34109

WELCOME TO THE ARGENTUM SENIOR LIVING SYMPOSIUM



James Balda
President & CEO
Argentum

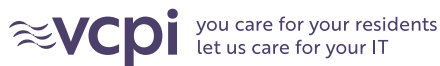
Welcome to Naples! Each year, Argentum hosts this annual gathering of executive leaders to network and engage in meaningful discussions about the most important issues facing our industry. This year our program is designed for maximum interaction, with varying formats, including two sessions featuring case studies on new initiatives. We hope you'll use this time to reconnect with your peers, recharge, and rethink delivering excellence in resident experience and safety, workforce development, and brand management. You'll also hear from operators who have successfully implemented new technologies and integrated new service lines. Finally, you'll hear from one of the world's preeminent generational economists, on where he thinks senior living design and resident engagement may be headed for the future. We're glad you're here.

ARGENTUM THANKS THE 2019 SENIOR LIVING SYMPOSIUM SPONSORS

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KEYNOTE SPEAKERS

OPENING KEYNOTE: How The Ritz-Carlton Delivers Extraordinary Service | Tiburon 1-2



Alexandra Valentin
Practice Director
The Ritz-Carlton Leadership Center

Opening session sponsored by



CLOSING KEYNOTE: Visioning NextGen Senior Living | Tiburon 1



Neil Howe
Author, Historian and Economist

Closing session sponsored by



MEDIA AT THE SYMPOSIUM

The 2019 Argentum Senior Living Symposium, with the exception of invite-only events, is open to the media and considered “on the record.” Media members will be present at the event and will be identifiable with a media ribbon for their badges.

Additionally, photography, audio, and video recordings may be present at the 2019 Argentum Senior Living Symposium. By attending the event, attendees give Argentum, its affiliates, contractors, and representatives permission to use any attendee’s voice and image in any archival or promotional recording, photograph, or streaming activity without any compensation or credit to the attendee. Attendees release Argentum, its vendors and employees, and all persons involved from any liability connected with the taking, recording, digitizing, or publication of interviews, photographs, video and/or or sound recordings.

REGISTRATION

Tiburon Foyer 1-2

Tuesday: 4:00 – 6:00 pm

Wednesday: 9:30 am – 12:00 pm

Thursday: 7:00 – 9:00 am

ABOUT ARGENTUM

Argentum is the leading national association exclusively dedicated to supporting companies operating professionally managed, resident-centered senior living communities and the older adults and families they serve. Since 1990, Argentum has advocated for choice, independence, dignity, and quality of life for all older adults. Argentum member companies operate senior living communities offering assisted living, independent living, continuing care, and memory care services. Along with its state partners, Argentum’s membership represents approximately 75 percent of the senior living industry—an industry with a national economic impact of nearly a quarter of a trillion dollars and responsible for providing over 1.6 million jobs. These numbers will continue to grow as the U.S. population ages. Argentum’s programs and initiatives are driven by its membership. For more information about joining Argentum, please visit argentum.org/membership. Learn more at argentum.org.

SCHEDULE AT A GLANCE

TUESDAY, OCTOBER 15

6:00 – 7:30 pm | Welcome Reception

The Ritz-Carlton Beach, 280 Vanderbilt Beach Road | Center Court. Complimentary shuttle bus service from The Ritz-Carlton Golf Resort to The Ritz-Carlton Beach Resort (5 miles away) at the half hour every hour with return service on the hour every hour.

WEDNESDAY, OCTOBER 16

8:00 am – 12:00 pm | Executive Roundtable Meetings (Invitation Only)

12:00 – 1:15 pm

Lunch and Opening Keynote | Tiburon 1-2


HOW THE RITZ-CARLTON DELIVERS EXTRAORDINARY SERVICE



Alexandra Valentin
Practice Director, The Ritz-Carlton Leadership Center

Ms. Valentin is an international speaker, advises organizations on culture transformation. Over her 22-year career with The Ritz-Carlton, she led teams to achieve the Malcolm

Baldrige National Quality Award as well as the PROCOMP Quality Award. Ms. Valentin is a Certified Hospitality Trainer (CHT) by the American Lodging and Educational Institute. Alexandra also completed the Executive Leadership Development Program at the Center for Leadership at Florida International University.

Opening session sponsored by: 

1:30 – 2:30 pm

Ask Me Anything: Candid Talk with Residents and Families | Tiburon 1-2

2:30 – 3:30 pm

Maximizing Success through a Diverse Workforce | Tiburon 1-2

3:45 – 4:30 pm

Beyond the Pilot: New Technologies that Work | Tiburon 1-2

4:30 – 6:00 pm

Senior Living Symposium Networking Reception | Court of Palms

6:00 – 9:30 pm

Silver PAC Trustee & Silver Circle Dinner | The Ritz-Carlton, Naples (Vanderbilt Beach) | Beach House (For eligible donors only, RSVP required)

Sponsored by:



THURSDAY, OCTOBER 17

7:45 – 8:45 am | Networking Breakfast | Court of Palms

8:45 – 9:30 am | Integrating New Service Lines | Tiburon 1

9:30 – 10:15 am | SPECIAL TOWN HALL: The Facts about Argentum's Standards Initiative | Tiburon 1

10:30 – 11:30 am | The Multi-Brand Strategy for Growth | Tiburon 1

11:30 am – 12:15 pm | Closing Keynote: Visioning NextGen Senior Living | Tiburon 1



Neil Howe
Author, Historian, and Economist

Neil Howe, best-selling author and national speaker, is a renowned authority on generations in America. He gives readers and audiences powerful insights into who today's generations are, what motivates them as consumers and workers, and how they will shape our national future.

Closing session sponsored by: 

WEDNESDAY, OCTOBER 16

12:00 – 1:15 pm | How The Ritz-Carlton Delivers Extraordinary Service

Our residents live with us 24/7, 365 days a year. No other industry category can make that claim. How do you lead your team to ensure you deliver extraordinary resident experiences with each and every touchpoint?

Hear from The Ritz-Carlton Leadership Center about how their iconic brand has operationalized a culture of service excellence. Gain thought-provoking insights that will set the table for the key theme of this year's Senior Living Symposium: delivering operational excellence while preparing for what's next in senior living.

Alexandra Valentin, *Practice Director, The Ritz-Carlton Leadership Center*

Opening session sponsored by:  **YARDI**

1:30 – 2:30 pm | Ask Me Anything: Candid Talk with Residents and Families

What do residents and families know that there's not the time or place to tell us? This session opens up communication in an enjoyable and compassionate way.

Join in this "ask me anything" discussion with local residents and adult children in a curated storytelling panel format. You'll leave informed and inspired to achieve the exceptional resident experience.

Moderator: Jonathan Ruchman, Senior Director, Customer Experience, Brookdale

Lydia Kruesi (resident); Cindy Kruesi (daughter), Vi at Bentley Village

Margaret Heller (resident); Kathy Heller Ferrier (daughter), Tuscany Villa of Naples (Five Star Senior Living)
Martha Haber (resident); Kathy Debiak (daughter), Brookdale Naples

2:30 – 3:30 pm | Maximizing Success through a Diverse Workforce

There is no success without diversity. We must keep high performers moving forward. We must engage employees from multiple generations, races, genders, and ethnicities. And we must work at the community level to hire for the right skills to assure the best care possible. Indeed, McKinsey data shows gender and ethnic diversity clearly correlates with improved profitability and lower turnover.

But what's measured is managed. Here's an opportunity to find out how—from a global organizational consulting firm who will present trends in workforce diversity, its advantages and business implications, and their lessons learned.

Randall Ian Thames, *Senior Partner, Korn Ferry*

3:45 – 4:30 pm | Beyond the Pilot: New Technologies that Work

Virtual reality, artificial intelligence, predictive analytics...what are senior living owner/operators doing now to maximize technologies for better care, higher resident engagement, or cost savings? As senior living prepares for the next generation of residents as well as workforce, these new technologies will become more commonplace—and expected in—your communities.

These two owner/operators have successfully graduated from the "pilot stage" to implementing new technologies. They share the lessons learned from that experience.

Moderator: Laurie M. Orlov, Principal Analyst and Founder, Aging in Place Technology Watch

Case studies from:

Schon Alkire, Innovative Solutions Developer, LifeWell Senior Living

Timothy W. Reilly, Vice President of Associate Experience, Benchmark Senior Living

THURSDAY, OCTOBER 17

8:45 – 9:30 am | Integrating New Service Lines

According to the International Council on Active Aging, “wellness” has already replaced “care” as a driving concept for community operations in senior living. At the same time, changes in Medicare Advantage and higher acuity rates have sparked an increase in delivery and management of primary care within senior living communities.

If you're interested in integrating new service lines within your operation, these case studies from two programs that made it work successfully will provide you with a roadmap.

Moderator: Cece Credille, VP, Quality Services, Enlivant

Case study from Tony Galvan, Jr., Director of Health & Wellness, Life Care Services

9:30 – 10:15 am | SPECIAL TOWN HALL: The Facts about Argentum's Standards Initiative

Much has been written and said about Argentum's standard initiative over the past several years, including whether or not the industry should have standards. In our view, the most important question industry operators should be asking is, which standards should the industry plan to adopt, and why?

Join us for a discussion about where we are with this initiative and learn more about the impact of self-regulation and how it advances an industry's reputation. Learn how you can engage with Argentum on these mission-critical initiatives, and ask questions in a candid, free-flowing dialogue.

Presenters: James Balda, President and CEO, Argentum
Jerald A. Jacobs, Partner, Pillsbury Law Firm

10:30 – 11:30 am | The Multi-Brand Strategy for Growth

Retail, hospitality, automotive, and consumer packaged goods have expanded their market shares by developing multi-brand strategies: brands with different price points, features and benefits, designed to appeal to varied customer bases, yet leverage the power of common leadership.

Can senior living grow through this approach? The answer looks to be yes—but with some caveats. Executives leading these brand roll-outs share their results and market differentiation strategies.

Moderator: Dana Wollschlager, Partner, AHM, CRM, COM, Practice Leader, Plante Moran

Maria Oliva, Chief Operating Officer, Pathway to Living
Eric Varin, AVP Sales & Marketing, Allegro
Lisa Torchia, MSN, RN, NEA-BC, Vice President of Clinical and Support Services, Country Meadows Retirement Communities

11:30 am – 12:15 pm | Visioning NextGen Senior Living

Are you prepared for the seismic shifts that will force changes to the senior living business model over the next 10 to 15 years? What will your workforce look like? How will new technologies impact the services your residents receive? What effect will the “wellness generation” have on what you offer? What new concepts in the healthcare and urban planning landscape will find their way to senior living concept designs?

Join us for an engaging reflection on what senior living may look like in the not-so-distant future, in this closing fireside chat between generations expert Neil Howe and architectural designer Max Winters. Learn more about Perkins Eastman's “Clean Slate Project” research and what it says about the future of senior living.

Neil Howe, Author, Historian, and Economist

Max Winters, Architectural Designer, Perkins Eastman

Closing session sponsored by:



SAVE THE DATE

2020 Argentum Public Policy Institute & Fly-In

The annual Argentum Public Policy Institute & Fly-In allows for industry professionals to discuss issues and solutions to the most important legislative and regulatory challenges at the state and federal levels, and advocate for critical senior living issues on Capitol Hill.

JOIN US IN WASHINGTON, DC

MARCH 17-18, 2020



MEET THE KEYNOTE SPEAKER

Jim VandeHei

Co-founder & CEO of Axios

Co-founder & former CEO of POLITICO

Learn more at argentum.org/ppi

This event is a complimentary benefit of membership.



SPEAKERS



Schon Alkire, Innovative Solutions Developer, LifeWell Senior Living

Schon graduated from Baylor University in 2010, obtaining his Activity Director Certification and becoming the Lifestyle Director for one of Houston's finest and most technologically advanced senior

communities. There, he excelled in implementing programs and technology that produced incredible results. In 2015, Schon joined the management team at LifeWell Senior Living, where he continues to use his unparalleled creativity and passion to advance technologies that help his teams better serve their residents.



Cece Credille, VP, Quality Services, Enlivant

Ms. Credille supports clinical and operations leadership at Enlivant, including management oversight for quality assurance, life enrichment, and customer satisfaction. Ms. Credille is a registered nurse and an active

member of the Illinois Health Care Association, and joins Enlivant after a 25-year tenure at HCR Manor Care with extensive operational, clinical and strategic experience. Her background in leadership healthcare management spans multiple care settings, including long-term care, assisted living, Alzheimer's care, rehabilitation and outpatient care.



Tony Galvan, Jr., Director of Health & Wellness, Life Care Services LLC

Tony Galvan is the Director of Health & Wellness for Life Care Services. As part of the LCS Health Services Division, Tony partners with all LCS communities to launch and execute comprehensive and successful

wellness and health navigation programs. Tony has worked in the health and wellness industry for over 17 years with expertise in lifestyle programming and the development and execution of post-acute and care coordination strategies.



Neil Howe, Author, Historian, Economist

A historian, economist, and demographer, Howe is a founding partner of the consulting firm LifeCourse Associates. He is a marketing, personnel, and government affairs consultant to corporate and

nonprofit clients and a recognized authority on global aging, long-term fiscal policy, and migration. Howe has coauthored several books on generations with William Strauss, with whom he coined the term "Millennial Generation." Howe grew up in California, received his B.A. at U.C. Berkeley, studied abroad in France and Germany, and later earned graduate degrees in economics (M.A., 1978) and history (M.Phil., 1979) from Yale University.



Jerald A. Jacobs, Partner, Pillsbury Law Firm

Jerry Jacobs is a partner with the Pillsbury law firm in Washington, DC and head of the firm's Nonprofit Organizations Practice representing over 100 trade associations and professional societies. He has

written a dozen books on nonprofit corporation law and is General Counsel to the "association of associations," the American Society of Association Executives. He is often described as the "Dean" of nonprofit organization lawyers in the U.S. Jerry and his firm are longtime outside legal counsel to Argentum.



Maria Oliva, Chief Operating Officer, Pathway to Living

An industry veteran with over 25 years of executive level experience, Maria is the chief operating role for Chicago-based Pathway to Living. In her role, she is responsible for strategic direction, fiscal management, leadership and culture

development. She is the architect and champion of Pathway's Viva! operating philosophy that takes a new approach and thinking of resident wellness and person-centered care. She is a member of the advisory board for Senior Living 100, sits on the Argentum Operations Executive Roundtable, and is a past board member of Leading Age Illinois.



Laurie M. Orlov, Principal Analyst & Founder, Aging in Place Technology Watch

Laurie M. Orlov, a tech industry veteran, writer, speaker and elder care advocate, is the founder of Aging in Place Technology Watch -- market research, trends, blogs and reports

that provide thought leadership, analysis and guidance about technologies and services that enable boomers and seniors to remain longer in their home of choice. Her latest reports include the Future of Voice First Technology and Older Adults in 2018, and an updated Market Overview of Technology for Aging in Place, published in 2019. The site was selected as one of CDW's Top 50 Health IT Blogs, and was named one of the Top 50 Influencers in Aging by Next Avenue. She has served on the HIMSS PCH Alliance Task Force for Technology and Aging.



Timothy W. Reilly, Vice President of Associate Experience, Benchmark

Tim Reilly has over 20 years of senior living experience, with success developing, implementing, and managing HR programs, policies, and services at two industry providers.

In his current role he is responsible

for ensuring all human resource processes in the areas of talent acquisition, associate relations, and legal compliance are aligned with and drive desired business results. Tim is a Board Member for the Massachusetts Assisted Living Association and is a member of the Argentum Human Resources Executive Roundtable.



Jonathan Ruchman, Senior Director, Customer Experience, Brookdale Senior Living

Jonathan Ruchman joined Brookdale in 2014 and brings over 25 years of experience in customer experience and brand marketing -- including senior marketing roles with leading

global advertising agencies New York City and Chicago, as well as Allstate Insurance Company. Jonathan manages the overall customer experience, with a focus on resident and family engagement. He created Brookdale's first Voice of the Customer Program and started a National Resident Advisory Council. Jonathan is also a designated CCXP, launching the CXPA Nashville Network to help grow the Customer Experience profession there



Randall Ian Thames, Senior Partner, Korn Ferry

Randall brings more than 30 years of expertise in executive management and development. Randall's career has primarily been spent in professional services consulting. His expertise includes leadership development

and coaching, training, executive and professional search, program design and business growth and development.



Lisa Torchia, MSN, RN, NEA-BC, Vice President of Clinical and Support Services, Country Meadows Retirement Communities

In her role, Lisa oversees nursing and wellness, and memory and restorative care programs throughout the organization. She holds a bachelor's

degree in nursing from East Stroudsburg University; a master's degree in nursing administration/critical care from Rutgers University; and a post master's certificate in nursing administration from Villanova University. She is a Johnson and Johnson, Wharton Nursing Executive Fellow. Prior to joining Country Meadows in 2017, she was Vice President of Patient Care Services/Chief Nursing Officer for Geisinger-Holy Spirit. She is a member of the American Organization of Nurse Executives, the Pennsylvania Organization of Nurse Leaders, and the American Nurses Association. Lisa is the current Chairman of the Board of Advisors for Pennsylvania State University -- Capital Campus.



Alexandra Valentin, Practice Director, The Ritz-Carlton Leadership Center

Alexandra Valentin advises organizations on culture transformation around the world. She has over 22 years of experience with The Ritz-Carlton, leading teams to achieve the Malcolm Baldrige National Quality

Award in 1999, and PROCOMP Quality Award. She served on the PROCOMP Board of Directors, helping organizations achieve top performance. She is a Certified Hospitality Trainer (CHT) by the American Lodging and Educational Institute, a Targeted Selection Trainer from Development Dimensions International (DDI) and recently completed an Executive Leadership Development Program via the Center for Leadership at Florida International University.



**Eric Varin, AVP Sales & Marketing,
Allegro Senior Living**

Mr. Varin is an Assisted Vice President of Sales and Marketing at Allegro Senior Living. As a part of the sales and marketing leadership team, he supports a wide array of company-wide sales and marketing initiatives and oversees new Allegro startups, in addition Alto Senior Living, Allegro's newest brand. Mr. Varin brings over 10 years of senior living sales and marketing leadership and strategy experience in the industry. He holds MBAs from Cornell University (New York) and Queen's University (Canada) and is a Certified Dementia Practitioner.



**Max Winters, Architectural Designer,
Perkins Eastman**

Max is a planner and designer at Perkins Eastman, working with senior care providers in the development of long-term visions for their communities' built environments.

Max has presented on regional and national stages about topics including making places for community-based care, innovative dementia environments,

and the transformative role technology will play in the future of aging. Through his involvement with Perkins Eastman's Research in Practice group, he co-authored the Clean Slate Project, a year-long research effort by Perkins Eastman to explore the senior living market through fresh eyes.



**Dana Wollschlager, Practice Leader,
Plante Moran**

As partner and practice leader for Plante Moran Living Forward, Dana brings more than 25 years' experience in the industry. Dana's expertise covers a wide area of disciplines ranging from design and construction oversight,

financing, and regulatory compliance to on-site operations and management. Dana attended the University of Minnesota and is a certified occupancy manager, residential manager, and assisted housing manager.

MEETING ROOMS MAP

