

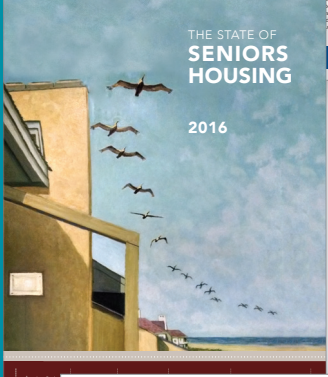


Roundtable

March 30-31, 2017



Cornell
Institute for
Healthy Futures



AMERICAN SENIORS HOUSING ASSOCIATION

Living Longer Better

PROUD SPONSOR OF THE 2017 Cornell Institute for Healthy Futures Roundtable Innovating Across Senior Living and Care



Photo Credit: Jordan Abdur-Raouf, SHA '18

Our mission is to provide a multi-disciplinary platform for integrating hospitality, policy, and design thinking to enhance service excellence in healthcare, wellness, senior living and related industries

mission

Roudtable: Innovating Across Senior Living and Care

Thursday, March 30, 2017

4:30 -- 5:30 p.m. **Career Paths and Internships Q&A**

398 Statler Hall
Cornell University

Moderator:

David Schless, *President, American Seniors Housing Association*

Panelists:

Denise Boudreau-Scott, MHA '94
President, Drive

Gabriel Corredor, CALS '05
Regional Director of Operations - Pennsylvania, Enlivant

Alice Katz, MBA '76
President, The Vinca Group L.L.C.

Robert Kramer

Founder and CEO, National Investment Center for Seniors Housing & Care

John Rijos, SHA '75, *Operating Partner, Chicago Pacific Founders, American Seniors Housing Association*

Betsy Schermerhorn

Director of Marketing and Admissions, Kendal at Ithaca

Jill Vitale-Aussem, MMH '96

Chief Operating Officer, Cappella Living Solutions

Roundtable: Innovating across Senior Living and Care



Thursday, March 30, 2017

5:30 -- 7:00 p.m. **Welcome Reception**
Introductions of participants

*Carrier Ballroom,
Statler Hotel*

Roundtable Chair: Brooke Hollis, MBA/Sloan '78
Associate Director Sloan Program in Health Administration & Cornell Institute for Healthy Futures

Posters from students in courses including:

Hospitality, Health, and Design Industry Immersion Seminar (HADM/DEA 4055/6055)

Health and Healing Studio (DEA 3304)

Operations and Planning of Senior Living and Related Facilities (PAM 5500/HADM 6033)

Fundamentals of Health Facilities Planning for Managers (PAM 5740)

Graduate Independent Research (HADM 6990)



Roundtable: Innovating Across Senior Living and Care

Friday, March 31, 2017

- 7:30 -- 8:15 a.m. **Registration and Networking Breakfast** *Carrier Ballroom Foyer Statler Hotel*
- 8:15 -- 8:45 a.m. **Welcome and Introductions**
Roundtable Chair: Brooke Hollis, MBA/Sloan '78
Associate Director Sloan Program in Health Administration & Cornell Institute for Healthy Futures
Carrier Ballroom
- 8:45 -- 10:00 a.m. **Design Ideas That Have Worked**
How to repurpose older facilities with high impact renovations to compete with newer facilities

Co-moderators:
Daniel Governanti, Executive Director, Kendal at Ithaca
Joseph Hassel, Principal, Perkins Eastman
- 10:00 -- 10:15 a.m. **Break** *Ballroom Foyer*
- 10:15 -- 11:30 a.m. **Who are the customers we should be planning for from 2020 to 2030? And, what will they really want?**

Co-moderators:
John Rijos, SHA '75
Operating Partner, Chicago Pacific Founders, American Seniors Housing Association
Robert Kramer, Founder and CEO,
National Investment Center for Seniors Housing & Care
- 11:30 -- 11:45 a.m. **Dealing with Challenges in Recruiting: Outsourcing and Staffing Firms Pros and Cons**
Instructions for luncheon discussion

Brooke Hollis, Roundtable Chair
- 11:45 -- 12:00 p.m. **Photo of Roundtable Participants**

Roundtable: Innovating across Senior Living and Care



Friday, March 31, 2017

Participants from 2016 CIHF Senior Living Roundtable

- 12:00 -- 1:00 p.m. **Training and Careers Luncheon and Discussion: How to Recruit and Train Talent - especially given new competition** *Rowe Room*

Students and Roundtable participants share their ideas and experience about:
- Ideas for improved recruiting and retaining younger talent
 - Hospitality training and customer service techniques to engage, empower and inspire staff to improve satisfaction
 - Other best practices for retaining established talent in the face of new competitors' recruiting efforts
 - Emerging trends and ideas to effectively utilize outsourced service providers and staffing firms in the face of projected labor shortages
- 1:00 -- 1:30 p.m. **Reports from Lunch Work Groups** *Carrier Ballroom*
- 1:30 -- 2:45 p.m. **Financing and Paying for Services: Long-term Care Insurance and Potential Alternatives**
Moderator:
Tom McInerney, President and CEO, Genworth Financial
- 2:45 -- 3:00 p.m. **Wrap-Up and Next Steps**
Hand in 2018 Roundtable Survey

participants



**Elizabeth Classen
Ambrose**
Proprietor,
Bridges Cornell Heights

For Elizabeth, Bridges Cornell Heights represents the culmination of more than 25 years of senior care immersion. Her journey began with co-founding a NYS licensed home health care agency with her sister Patricia, which became the largest privately owned licensed agency in upstate NY. Their partnership evolved with the renovation of historic homes into assisted living residences in Ithaca and Rochester. Elizabeth then developed Bridges Cornell Heights senior residences linked to cultural opportunities at Cornell. Bridges' partnership with Cornell creates winning ventures: Project Generations pairs Cornell students with Bridges residents for long-term weekly visits; Cornell professors lead engaging discussion groups at Bridges; and access to bright interns helps Elizabeth and Bridges light the future path for our wisest generation. Moving forward, Elizabeth's plans include adding options to accommodate younger, independent seniors and mentoring other senior living professionals in the Bridges approach. Elizabeth is energized and inspired daily by a love for people - especially older, wiser people and her young children.

Kelly Cook Andress began her career in senior housing in 1989 at Sunrise Senior Living, Inc. where she was Vice President for Development and Finance. She helped define the company that came to define the industry.

She has been closely involved in the development of more than 20 communities in the Northeast and Mid-Atlantic; developing, acquiring and operating senior communities at all levels of independence and care.

Seeing the evolution in senior housing move towards cookie-cutter, Wall Street-driven corporations, Kelly was inspired to forge a new definition of senior living; rooted in a dedication to building communities with the flexibility to adjust around residents as their desires and needs change.

Kelly Andress
President,
Sage Senior Living



**Laura Barré,
MD, CHE '91**
Assistant Clinical Professor,
Division of Nutritional Sciences,
Cornell University

Laura Barré, MD, RD is a clinical assistant professor in the Division of Nutritional Sciences at Cornell. Her research interests include successful aging and interventions that address obesity, mental health and nutritional status in older adults to delay and/or prevent nursing home placement. Currently, Laura is studying the implementation and outcomes of a technology-assisted aging in place program, Full Circle America, in Steuben County, NY.

Dr. Barré graduated from Dartmouth Medical School in 2001 and completed an NIH T32 postdoctoral fellowship in geriatric mental health in 2011. Prior to medical school, Laura earned a B.S. in nutrition from Cornell University, completed a dietetic internship at Emory University Hospital and practiced as a clinical registered dietitian for 4 years, with a focus on geriatrics.

Denise Boudreau-Scott is President of Drive, which helps aging services organizations improve the resident and staff experience, and the bottom-line, through more engaged leaders and employees.

A former nursing home and assisted living administrator, Denise is a serial volunteer. She co-founded and is Chairperson of the New Jersey Alliance for Culture Change, serves as Vice-chair of the National Association of Administrator Board's (NAB) Member Relations Committee and is a member of NAB's Exam Writing Committee. Denise was recently appointed as a board member for the Pioneer Network and to the Center for Excellence in Assisted Living's Advisory Council.

Denise received her Bachelor of Science in Gerontology from the University of Scranton and her Master in Health Administration from Cornell University where she is appointed as an Executive in Residence.

**Denise Boudreau-Scott,
MHA '94**
President,
Drive



participants

participants



Scott Gensler,
SHA '94
Vice President of Business Development,
Erickson Living

Scott identifies and evaluates new business opportunities for Erickson Living, the nation's leading developer and manager of Continuing Care Retirement Communities. Throughout Scott's 18-year tenure with Erickson Living, he has served in many leadership positions. He has an impressive knowledge of key aspects of the senior living business, including Development, Acquisitions, Finance, Sales and Marketing, and Operations.

Mr. Gensler earned a M.B.A. from the Sellinger School of Business at Loyola College and B.S. from the School of Hotel Administration at Cornell University.

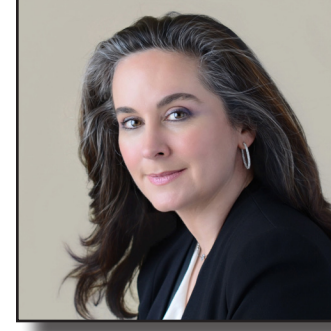
Mr. Gensler serves as the Vice Chair of the Fund for Education Excellence, a local education fund working to improve student achievement in Baltimore City Schools. He also serves on the board of the JCC of Greater Baltimore and Beth Israel Congregation.

Mr. Governanti has over 39 years of experience in health, long-term care and residential services for seniors. Since September 2000 he has served as Executive Director/CEO of Kendal at Ithaca, a Continuing Care Retirement Community, affiliated with the Kendal System of Communities and Services.

Prior to joining Kendal he served as the President/CEO of Good Shepherd-Fairview Home, Inc. in Binghamton, NY. He has been an active member of LeadingAge New York, previously serving on its Board of Directors and as chair of several committees.

He has a B.S. degree from the State University of New York - Oswego and has been a licensed Nursing Home Administrator in NY since 1977.

Daniel Governanti
Executive Director,
Kendal at Ithaca



Esther Greenhouse,
CHE '93, MS '03
Environmental Gerontologist,
Esther Greenhouse, LLC

Esther Greenhouse is a unique professional: an environmental gerontologist and designer advising manufacturers, consulting on regional PBS series, and developing the program for the visual environment of the nation's first elder-focused emergency department. A contributor to Henry Cisneros' book Independent for Life, she is recognized as a national expert in both Universal Design and Aging in Place. Involved with AARP's Age-Friendly Communities program, Ms. Greenhouse is a catalyst for positive change working with municipalities. An award-winning instructor for the National Association of Home Builders, Ms. Greenhouse's goal is to create environments of all scales which enable people to thrive.

David is a highly-regarded healthcare professional with over 30 years of experience in delivering high quality performance to his clients. His innovative style and management approach have resulted in a track record of exceptional client retention and high levels of client satisfaction scores. His expertise includes client relations, change management and process improvement in senior living markets. In his current role as a National Client Executive for Seniors in Sodexo, David is responsible for our Asbury and ManorCare business portfolio in Maryland, Pennsylvania and Oklahoma.

David holds a Bachelor of Science degree in Hotel Resort Management from East Stroudsburg University.

David Gress
Regional Vice President,
Sodexo



participants

participants



Joseph Hassel
Principal,
Perkins Eastman

Joe Hassel offers more than 20 years of experience in planning, architecture, and interior design almost exclusively dedicated to improving the lives of seniors. He has served as a speaker and educator on master planning, architecture, and interior design at a variety of national forums from LeadingAge and its local chapters to The Global Ageing Network. Mr. Hassel is a contributing author to the Wiley textbook, Building Type Basics for Senior Living, and a product designer and consultation advisor to furniture manufacturers designing for older adults. Mr. Hassel is a professional member of the International Interior Design Association (IIDA) and the National Council for Interior Design Qualification (NCIDQ); an associate member of the American Institute of Architects; and a member of LeadingAge.

Alice Katz is the President of The Vinca Group L.L.C. She directs market feasibility, regulatory reviews and operations and financial analysis for senior housing and health care facilities. Ms. Katz has been responsible for asset management and technical assistance to improve operating and financial performance for multi facility portfolios. Ms. Katz was the co-founder of Oakwood Living Centers, Inc. which was a skilled nursing facility and rehabilitation company. She was a Senior Manager with Ernst and Young where she served as the Project Manager for the study that initially evaluated DRG reimbursement.

Ms. Katz has a BS from The Pennsylvania State University and an MBA with distinction and a Sloan Certificate from Cornell University.

Alice Katz, MBA '76
President,
The Vinca Group L.L.C.



Lynne Katzmann
President and CEO,
Juniper Communities

Lynne Katzmann is Founder and President of Juniper Communities, which invests in, develops and manages senior living and long term care communities. With 20 properties in four states and more than 1200 employees, Juniper, has \$75 million in revenues. Juniper is ranked #12 by Crain's New York on its Top 50 ranking of woman-owned companies for the New York tri-state area.

Juniper is the only woman-founded, owned and led business among the top 40 national assisted living companies. Katzmann launched the business when she was 32, with six years' experience in the health care industry and a PhD in economics.

Steve Kramer currently serves as President and CEO of The Mayflower Retirement Community in Winter Park, FL. Prior to this, he was President and CEO of North Penn Comprehensive Health Services in Wellsboro, PA. Steve has possessed leadership roles in both the healthcare and hospitality industries for the past 24 years. From General Manager at Cracker Barrel Old Country Store through CEO for a system of Federally Qualified Health Centers and his current position in senior living, Steve has coordinated the activities of a diverse group of individuals in a wide variety of settings. These experiences have positioned Steve as a well-rounded, multi-faceted leader with a unique depth of knowledge and skills.

Steve completed his MBA, with a concentration in Healthcare Administration, at the University of Michigan. His undergraduate work at Penn State culminated with a B.S. Degree in Hotel, Restaurant and Institutional Management. Steve is also a Fellow of the American College of Healthcare Executives.



Steve Kramer
President & CEO,
The Mayflower
Retirement Community

participants

participants

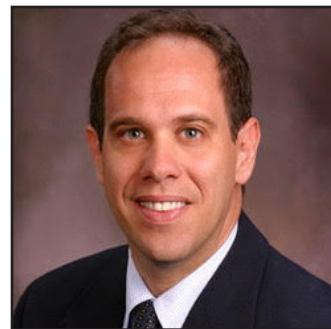


Robert Kramer
Founder and CEO,
National Investment
Center for Seniors
Housing & Care (NIC)

Mr. Kramer is founder and CEO of the National Investment Center for Seniors Housing & Care (NIC), a non-profit education and resource center that serves debt and equity investors interested in the seniors housing and care industry. NIC is the leading provider of research as well as business and financial performance data on this sector for capital providers. NIC's focus is to enable access and choice in seniors housing and care by providing data, analytics and connections that bring together investors and care providers. Mr. Kramer, a frequent writer and speaker on trends in seniors housing and long-term care, has directed NIC since its inception in 1991. A former county government official and Maryland state legislator, Mr. Kramer was a leader on health and environmental issues while representing the state capital of Annapolis in the 1980s. Mr. Kramer was educated at Harvard and Oxford Universities and also holds a Master of Divinity degree from Westminster Theological Seminary.

Mark Levine graduated from the Sloan program in 1990 and became a licensed nursing home administrator in 1991. He has served as the licensed Administrator of a nursing home that earned the Florida Governor's "Gold Seal" award for excellence. This distinction is provided to less than 2% of nursing homes in Florida that demonstrate superior programming and measurable quality outcomes. Mr. Levine has managed non-profit senior care campuses of care with regional or national reputations for quality and innovative services. In the last decade, he has successfully opened, operationalized, and secured Medicare/Medicaid certification for three new nursing homes.

Mark Levine,
MHA '90
Long Term Health Care
Administrator,
Levine & Associates



Corinna Loeckenhoff
Associate Professor of Human
Development,
Cornell University;
Associate Professor of Gerontology in
Medicine at Weill Cornell Medical College

Dr. Loeckenhoff received her undergraduate degree from the University of Marburg, Germany and her Ph.D. from Stanford University. She completed a post-doctoral fellowship in the intramural research program of the National Institute on Aging before joining Cornell University in 2009. She is a fellow of the Gerontological Society of America, was recognized as a Rising Star by the Association for Psychological Science in 2011, and received the Margret M. and Paul B. Baltes Foundation Award in Behavioral and Social Gerontology in 2014. In 2013, her efforts in teaching gerontology were honored by a SUNY Chancellors Award for Teaching Excellence.

Thomas J. McNerney is President and Chief Executive Officer of Genworth. He joined Genworth January 2013 from The Boston Consulting Group, where he served as Senior Advisor since June 2011, providing consulting and advisory services to leading insurance and financial services companies in the United States and Canada. Prior to that, Mr. McNerney spent 30 years working with ING Groep NV and Aetna Inc. For many years, he has been active with the American Council of Life Insurers and the Financial Services Roundtable, serving on each association's board and Chief Executive Officer Committee. Mr. McNerney received his B.A. in Economics from Colgate University and a M.B.A. from the Tuck School of Business at Dartmouth College.

Tom McNerney
President and CEO,
Genworth Financial



participants

participants



Matt Monson,
MBA '09
Vice President of Acquisitions
and Business Development,
Mainstreet Health Investments

Matt Monson is vice president of acquisitions and business development at Mainstreet, overseeing its investment department and responsible for underwriting, structuring and closing Mainstreet's mergers and acquisitions, and third party developments. Prior to joining Mainstreet, Mr. Monson was director, corporate investments at Welltower (NYSE: HCN) where he was responsible for investments and dispositions of medical office and seniors housing properties and operations as well as overseeing the financial and operating performance of key operating partners.

Mr. Monson holds an MBA from the Johnson School of Management at Cornell University, a master's degree in real estate from Cornell University and a bachelor's degree from Brigham Young University. He currently sits on BYU's construction management advisory board and is an active member of the real estate council at Cornell's Baker Program in Real Estate.

Cate O'Brien is Director of Research at Mather LifeWays Institute on Aging, where she has worked since 2005. Her academic training is in the areas of Public Health and Gerontology. Dr. O'Brien leads Institute efforts to conduct applied research benefiting older adults and professionals in the senior living and aging services sector. Current research initiatives focus on employee engagement, positive aging, and brain health, among others. In addition, Dr. O'Brien serves as Managing Editor of Seniors Housing & Care Journal and oversees InvestigAge, an online resource for current research and trends impacting housing and services for older adults.

Cate O'Brien
Director of Research,
Mather LifeWays



John Peters
Senior Vice President,
Senior Star

John is a member of Senior Star's Executive Committee focusing on Operations, IT Management and Systems Improvement. Before joining Senior Star in 2015, he spent 18 years managing a large industrial services operation providing leadership and oversight in the areas of New Business/Sales development, Customer Service, G & A, Safety, Major Account Management and Human Resources. John earned his BS from the University of Tulsa and MBA from Oklahoma State University. He is a member of ASHA's Rising Leaders program and has had a long relationship with the Alzheimer's Association. John is also a member of the Tulsa Regional Tourism Advisory Board and serves on the Cascia Hall Preparatory School Board of Directors. He resides in Tulsa with his wife Erin and their two sons.

John P. Rijos is Co-Founder and Operating Partner of Chicago Pacific Founders, a private equity firm that specializes in investments across the healthcare spectrum with offices in Chicago and San Francisco. Prior to that, Mr. Rijos spent thirteen years as Co-President and Chief Operating Officer of Brookdale Senior Living, Inc., the largest senior living company in the United States. During his tenure, the company grew from 22 communities to approximately 650 communities in 36 states with more than 67,000 units and 46,000 associates who serve residents in independent living, assisted living, memory care, skilled nursing and large campus continuous care retirement communities.

John Rijos,
SHA '75
Co-Founder & Operating
Partner,
Chicago Pacific Founders,
American Seniors Housing
Association



participants

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David Schless
President,
American Seniors
Housing Association

David Schless has been the president and CEO of the Washington, DC-based American Seniors Housing Association since it was founded in 1991. ASHA's members are senior executives involved in the finance, development, and operation of the full spectrum of seniors housing property types. The association represents the industry on legislative and regulatory matters, advances research related to senior living quality, and recently launched a consumer education initiative: *whereyoulivematters.org*

Mr. Sherman joined Dougherty Mortgage, LLC in August, 2015. He has more than 40 years' experience in the seniors housing and health care industry, and is an expert in providing financing and financial advisory services in seniors housing, long term care, and health care finance. Beginning in the early 1970's he worked as a Certified Public Accountant advising health care, long term care, and seniors housing clients on accounting issues, third party reimbursement issues, and real estate and corporate finance issues.

Mr. Sherman is a graduate of Macalester College and received his Certified Public Accountant certificate. He is a recognized leader in the seniors housing industry, having presented at many seminars and seniors housing seminars, and serving on the boards of many professional organizations.



James Sherman
Senior Vice President,
Dougherty Mortgage LLC



Vince Slaugh
Assistant Professor,
School of Hotel
Administration,
Cornell University

Vince Slaugh is an assistant professor at the Cornell University School of Hotel Administration (SHA). He received his PhD in operations management from the Tepper School of Business at Carnegie Mellon University, and joined the SHA faculty in July 2016. Slaugh holds a BS and MS in industrial engineering and a BA in history from Penn State University.

In his research, Slaugh studies analytical models designed to improve service operations including online rental businesses, child adoption and foster care matching networks, and staffing for nursing homes. Methodologically, he develops stochastic inventory models traditionally associated with supply chain management and adapts them to new and innovative services. His collaborations include SmartOps, Symmco, the Pennsylvania Statewide Adoption Network, Adoption-Share, Vincentian Collaborative System, and the Passavant Community. His work appears in *Manufacturing and Service Operations Management* and *Interfaces*.

Tabacchi, PhD, Biochemical Nutrition, RD, taught the first academic Corporate Wellness Course in 1986. Ten year member, Board of Directors and founder Global Wellness Summit, founder of The New York Spa Alliance and the International Spa Association. Taught Health Resort Management, and Healthful Cuisine. An avid hiker, jogger, world adventure traveler and power yogi, she is a passionate proponent of healthful, meaningful and active aging. Consulted on healthful menus for seniors and an ombudsman in senior homes. A Healthy Futures fellow and spa and wellness consultant. Advisor to Sloan students studying "Best practices in hydration and nutrition in Senior Homes and Hospitals."



Mary Tabacchi
Professor Emerita,
School of Hotel
Administration,
Cornell University

participants



Jill Vitale-Aussem,
MMH '96
Chief Operating Officer,
Cappella Living Solutions

Jill Vitale-Aussem is Chief Operating Officer of Cappella Living Solutions, a consulting and third party management firm serving not-for-profit and for-profit owners of CCRCs, Assisted Living and Memory Support Communities across the country.

Jill has nearly 20 years experience leading senior living organizations. She earned a Master of Management in Hospitality degree from Cornell University School of Hotel Administration. She is a licensed nursing home administrator, a certified assisted living administrator and an Eden Alternative Guide and Educator. Jill is passionate about creating community cultures of excellence, growth, and empowerment and writes and speaks nationally on the topics of culture, leadership and ageism.



Rohit Verma
Executive Director

Rohit Verma is the executive director of the Cornell Institute for Healthy Futures (CIHF), Dean of External Relations, Cornell SC Johnson College of Business, and the Singapore Tourism Board Distinguished Professor. Verma has published over 70 articles in prestigious academic journals and has also written numerous reports for the industry audience. He regularly presents his research, participates in invited panel discussions, and delivers keynote addresses at major industry and academic conferences around the world.

Brooke Hollis,
MBA '78
Associate Director

Brooke Hollis is associate director of both CIHF and the Sloan Program in Health Administration. Mr. Hollis' background includes over three decades serving in senior management positions. He has worked in both academic and community medical centers, and was president of an entrepreneurial group that developed specialty clinics and services for hospitals in three states. His mergers & acquisitions advisory work has been for health and services firms in 20 states. He has an MBA and Sloan Certificate in Health Administration from Cornell University and a Master of Architecture and Urban Design from Washington University in St Louis.

Mardelle Shepley
Associate Director

Dr. Mardelle McCuskey Shepley, B.A., M.Arch., M.A., D.Arch., FAIA, FACHA is a professor in the Department of Design and Environmental Analysis and associate director of CIHF. Previously she served as professor and director of the TAMU Center for Health Systems & Design. Dr. Shepley has authored five books, including Design for Critical Care (2009), Health Facility Evaluation for Design Practitioners (2010) and Design for Pediatric and Neonatal Critical Care (2014). Dr. Shepley has worked in professional practice, full-time and part-time, for 25 years.

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Melissa Ceriale, P'15, '16, '18, Board of Trustees, Montefiore Medicine

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Peter Yesawich, SHA '72, MS '74, PhD '76



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to Mardelle Shepley's DEA 3304 Health and Healing Studio
for designing the CIHF Roundtable Program!

DEA 3304 members: Ming Chi, Ah Jin Cho, Dina Kaganer,
Olivia Alexandra Matticoli, Pui Lam So, Ayda Uraz, and Amy Vu.

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to create a . . .*

Bright FUTURE

The College of
Human Ecology

Improving lives by exploring and shaping human connections to natural,
social, and built environments

The School of
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Creating and disseminating knowledge about hospitality management
through teaching, research, industry relations, and service