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NIC 2020 FALL Conference

Investing in Seniors Housing & Care Properties

OCTOBER 6-8 | OCTOBER 13-15

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EDUCATIONAL PROGRAM

Sessions & Speakers

40+ CONCURRENT SESSIONS | 50+ SPEAKERS
5 NIC Talks 1 ESSENTIAL EVENT

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October 6	Session Title	Session Objective	Speaker/Moderator
12:45 – 1:00	<p>Operator Spotlight: Anticipating the Unanticipated: Evacuating Residents Safely During a Pandemic</p> <p>Track: Senior Care Focus: Managing Margins</p>	<p>Hear storytelling from Jack Callison, CEO of Enlivant share how he navigated evacuations during a pandemic. Interview-style vignettes with seniors housing and care executives</p>	<p>Speaker: Jack Callison CEO Enlivant</p>
1:00 – 2:00	<p>What Does Senior Living Look Like in the COVID Era: The New Role of Health and Healthcare Onsite</p> <p>Track: Senior Care Focus: Managing Margins</p>	<ul style="list-style-type: none"> • Discover how COVID is changing the relationship between housing and healthcare for residents • Identify partnerships that can deliver benefits to residents and improve length of stay • Hear how referral patterns are changing and what can be done to improve them • Learn what constitutes effective care to help seniors get the most out of their setting 	<p>Moderator: Bob Kramer Founder & Strategic Advisor, NIC President, Nexus Insights</p> <p>Speakers: Michael Grust President and CEO, SRG</p> <p>James Lydiard Staff Vice President CareMore Health</p>
1:15 – 1:45	<p>Combatting the Impact of Social Isolation and Loneliness</p> <p>Track: Senior Care Focus: Managing Margins</p>	<p>Protecting residents from coronavirus can lead to other unintended health challenges, particularly loneliness and social isolation.</p> <ul style="list-style-type: none"> • While these actions taken to protect residents are necessary and well-intended, living in isolation can lead to physiological and neurological changes • Learn about the latest programming, design, and operational changes within the seniors housing and care sector that are put in place to combat these challenges. 	<p>Speaker: Ryan Brooks Senior Principal, Healthcare NIC</p>
2:15 – 3:15	<p>Four Weeks Outs from the General Election: A Policy Discussion with Soledad O'Brien, Mark Parkinson and Andy Slavitt</p> <p>Track: Senior Care Focus: Managing Margins and Realizing Returns</p>	<p>Mark Parkinson, President & CEO, ACHA/NCAL and Andy Slavitt, Former Administrator for the Center for Medicaid and Medicare Services share their perspectives and discuss potential impacts from the election:</p> <ul style="list-style-type: none"> • Anticipated changes to healthcare policy in a COVID-19 world • Potential regulatory impacts for long term care • Changes to private health plans • Medicaid and Medicare 	<p>Keynote Speakers: Soledad O'Brien, Award Winning Journalist, Documentarian, Entrepreneur & Philanthropist</p> <p>Mark Parkinson, President & CEO, AHCA/NCAL</p> <p>Andy Slavitt, Former Acting Administrator of the Centers of Medicare and Medicaid Services and Senior Advisor, The Bi-Partisan Policy Center</p>

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3:30 – 4:00	<p>NIC Talks: How Will COVID-19 Impact the Future of Aging and Aging Services?</p> <p>Track: Senior Care Focus: Managing Margins</p>	<p>Our popular NIC Talks series returns. Hear insights and perspectives from innovative thought leaders and experts as they all address the theme of this year's NIC Talks. Be Inspired!</p> <ul style="list-style-type: none"> •Dr. Ferris's NIC Talk: The Impact of COVID-19 on Healthcare Delivery for Elder Americans •Ms. Drobac's NIC Talk: Telehealth Beyond COVID-19, A Bigger Leap Ahead 	<p>Speakers: Krista Drobac Executive Director Alliance for Connected Care</p> <p>Tim Ferris, MD CEO, Mass General Physicians Organization/ Professor, Harvard Medical School</p>
3:30 – 4:30	<p>Placemaking in Senior Living: How Community Culture Leads to Positive Outcomes</p> <p>Track: Skilled Nursing Focus: Managing Margins</p>	<ul style="list-style-type: none"> •What is placemaking and what are the benefits to residents and investors? •How can placemaking be applied to senior living communities? •Discuss how the right company/community culture can lead to staff retention and growth, higher satisfaction for residents and their families and desired outcomes for revenue and expense models 	<p>Moderator: Susan Barlow Co-Founder & Managing Partner Blue Moon Capital Partners</p> <p>Speakers: Kris Engskov President, Aegis Living</p> <p>Erin Ottenbreit VP of Operations Cedarbrook Senior Living</p>
3:30 – 4:15	<p>New Construction: Balancing Community, Safety and Lifestyle Needs for the Next Generation Consumer</p> <p>Track: Seniors Housing Focus: Managing Margins</p>	<p>Seniors Housing (AL, IL, MC)</p> <ul style="list-style-type: none"> •Who's building? •Design adaptations to lower contagion risk in senior living •Ways to maintain the value proposition of senior living through the built environment 	<p>Speakers: Ryan Brooks Senior Principal, Healthcare NIC</p> <p>David Segmiller Principal Hord Coplan Macht</p>
4:00: 4:30	<p>NIC's Skilled Nursing Data Report</p> <p>Track: Skilled Nursing Focus: Managing Margins</p>	<ul style="list-style-type: none"> •The NIC Skilled Nursing Data Initiative is driven by the need to increase transparency in the skilled nursing sector •Gain insight into accurate, relevant and timely data critical for investors, operators, and other stakeholders •Key revenue and occupancy trends on skilled nursing including Occupancy, Managed Medicare, Revenue per patient day by payor source, Quality mix, Skilled mix, Patient day mix 	<p>Speaker: Bill Kauffman Senior Principal, Skilled Nursing NIC</p>

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4:15 – 5:15	<p>30 Days from Start to Finish: Getting a Deal Done During the Pandemic</p> <p>Track: Seniors Housing Focus: Realizing Returns</p>	<ul style="list-style-type: none"> •Hear about a deal done during COVID •How did each party look at the transaction? •What terms that were standard in a deal pre-COVID still apply? •What terms do all parties need to agree to now? 	<p>Speakers:</p> <p>Brian Cannella Managing Director, Kayne Anderson Real Estate</p> <p>Lori Coombs Managing Director, Wells Fargo: Multi Family Capital</p> <p>Thomas Schissler Managing Director, Wells Fargo Multi Family</p> <p>Steve Schmidt National Director, Seniors Housing Group, Freddie Mac</p>
	<p>Architecture and Design: COVID-19's Impact on Seniors Housing</p> <p>Track: Seniors Housing Focus: Managing Margins</p>	<ul style="list-style-type: none"> •A leading architect will share design concepts for senior living communities to open safely in the world of COVID •Understand what aspects of your buildings pose the greatest risk for virus transmission, along with practical strategies to mitigate risk •Learn strategies to re-purpose existing space for dining while practicing social distancing • Hear engineering protocols to help reduce the spread of pathogens 	<p>Speaker:</p> <p>Eric S. McRoberts, AIA Partner RLPS Architects</p>
	<p>Valuations in Skilled Nursing: How Have Trends Changed and Why?</p> <p>Track: Skilled Nursing Focus: Realizing Returns</p>	<ul style="list-style-type: none"> •Who's buying and selling today? •When will transaction activity to pick up? •How have valuation methodologies changed and why? •Have cap rates been changed? •How do you underwrite in this period of flux and disruption? How do you evaluate risk? •How do you adjust your underwriting to factor in the potential impact of COVID-19 in community? 	<p>Moderator:</p> <p>Zach Bowyer Managing Director/ Head of Alternatives, JLL Valuation Advisory</p> <p>Speakers:</p> <p>Aaron Becker Senior Managing Director Lancaster Pollard</p> <p>Josh Kocheck CIO, Hana2.0</p>

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October 7	Session Title	Session Objective	Speaker/Moderator
12:45 – 1:00	Operator Spotlight: Juniper Leads with Testing in its Covid Battle Plan Track: Seniors Housing Focus: Managing Margins	Lynne Katzmann, President and CEO of Juniper Communities shares how she navigates testing accessibility for her staff. Interview-style vignettes with seniors housing and care executives	Speaker: Lynne Katzmann President and CEO Juniper Communities
1:00 -1:45	NIC Talks: How Will COVID-19 Impact the Future of Aging and Aging Services? Track: Senior Care Focus: Managing Margins	Our popular NIC Talks series returns. Hear insights and perspectives from innovative thought leaders and experts as they all address the theme of this year's NIC Talks. Be Inspired! •Dr. Aronson's NIC Talk: Ageism and COVID-19: Opportunities to Create a Better Future •Mr. Cinelli's NIC Talk: How Will Disruptive Forces like COVID-19 Impact the Design of Senior Living? •Ms. Jenkins' NIC Talk: Home, Health and Innovation: A Glimpse into the Future	Speakers: Dr. Louise Aronson Professor UCSF Division of Geriatrics Dan Cinelli Principal Perkins Eastman Jo Ann Jenkins CEO AARP
	Capital Expenditures: Are Investors Changing Their Assumptions in A COVID- 19 World? Track: Seniors Housing Focus: Managing Margins	•What's appropriate to budget for the different types of capital expenditures? •Have investors changed their assumptions?	Speakers: Colleen Blumenthal COO/Managing Partner HealthTrust Lukas Hartwich Senior Analyst Green Street Advisors
	Implications of Recent Policy Changes Track: Senior Care Focus: Managing Margins	•Implications of three-day stays •Telemedicine •What does it all mean? •Will there be changes for AL as well?	Speakers: Dan Mendelson Founder, Avalere Anne Tumlinson CEO, ATI Advisory Group
2:00: 3:00	Debt & Equity in Skilled Nursing in the Age of COVID-19 Track: Skilled Nursing Focus: Realizing Returns	•Have debt providers changed their terms and perspectives on skilled nursing? •Changes to underwriting standards •Have public equity providers' views changed since early 2020?	Moderator: Vikas Gupta SVP, Acquisitions and Development, Omega Healthcare Investors, Inc. Speakers: Kevin Giusti , Managing Director Real Estate Finance, Walker & Dunlop Elliott Mandelbaum Managing Partner, BM Eagle Holdings LLC

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	<p>NIC Bluebook: The Impact of a Recession and a Pandemic in the Seniors Housing and Care Sectors</p> <p>Track: Seniors Housing Focus: Realizing Returns</p>	<ul style="list-style-type: none"> •A deep dive into the state of the economy and the impact of the COVID-19 pandemic on the seniors housing and care sectors featuring the most up to data available on market fundamentals and regional differences •Considerations on the shape of the economic recovery and underlying risks •Disparities in market perform. by sector and region 	<p>Speaker: Beth Mace Chief Economist NIC</p>
	<p>Valuations in Seniors Housing: How Have Trends Changed and Why?</p> <p>Track: Seniors Housing Focus: Realizing Returns</p>	<ul style="list-style-type: none"> •Market's current velocity and liquidity •Who's buying and selling today? •When will transaction activity to pick up? •How have valuation methodologies changed and why? •Have cap rates been changed? •Difference in trends between IL, AL, MC, SN (NIC data) •How do you underwrite in this period of flux and disruption? How do you evaluate risk? •How do you adjust your underwriting to factor in the potential impact of COVID-19 in community? 	<p>Speaker: Manisha Bathija Former Senior Investment Officer, Ventas, Inc. Independent Consultant</p> <p>Ben Firestone Executive Managing Director & Co-Founder Blueprint Healthcare Real Estate</p> <p>Ryan Maconachy Vice Chairman, Healthcare & Alternative Assets Newmark Knight Frank</p>
3:15: 3:30	<p>Operator Spotlight: Mental Wellbeing: Taking Care of Staff During a Pandemic</p> <p>Track: Senior Care Focus: Managing Margins</p>	<p>Lori Alford, Chief Operating Officer of Avanti Senior Living shares how she leads her staff on a journey of mental wellbeing during a time of crisis.</p>	<p>Speaker: Lori Alford Chief Operating Officer Avanti Senior Living</p>
3:30: 4:30	<p>People: A Critical Component of a Successful Community</p> <p>Track: Senior Care Focus: Managing Margins</p>	<ul style="list-style-type: none"> •How labor market has changed as a result of COVID-19 •What seniors housing and skilled nursing operators are doing to attract and retain new talent •Technology's role in managing staffing challenges •How investors think about labor 	<p>Speakers: Lucinda Baier President & CEO, Brookdale Senior Living</p> <p>Lilly Donohue CEO, Holiday Retirement</p> <p>Joel Nelson President and CEO, LCS</p>

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	<p>Dramatic Moments in History: Another Period of Disruption</p> <p>Track: Senior Care Focus: Managing Margins and Realizing Returns</p>	<ul style="list-style-type: none"> •How does the COVID-19 pandemic compare to other black swan events? •What can we learn? •Potential structural impact on operations and Capital? 	<p>Speaker: Kurt Read Principal, RSF Partners</p> <p>Cameo Speakers: Bob Kramer Founder & Strategic Advisor, NIC/Presenter Nexus Insights Beth Mace Chief Economist, NIC</p> <p>Dana Scheppmann Senior Vice President Capital One Healthcare Real Estate Kathryn A, Sweeney Co-founder and Managing Partner Blue Moon Capital Partners</p>
	<p>Debt & Equity in Seniors Housing in The Age of COVID-19</p> <p>Track: Seniors Housing</p>	<ul style="list-style-type: none"> •Have debt providers changed their terms and perspectives on seniors housing? •Changes in underwriting standards •Have public equity providers' views changed since early 2020? 	<p>Moderator: Steven Schmidt, National Director, Seniors Housing Group, FreddieMac</p> <p>Speakers: Sarah Anderson Managing Director Newmark Knight Frank</p> <p>Mark Cotsakis, EVP, Head of Seniors Housing Finance Wells Fargo: Multi Family Capital</p> <p>Talya Nevo-Hacohen, CIO, Sabra Health Care REIT</p>
4:30: 5:30	<p>Four Weeks Out from the General Election: A Conversation with Veteran Observers, Soledad O'Brien, David Brooks, David Gergen</p> <p>Track: Senior Care Focus: Managing Margins and Realizing Returns</p>	<p>Hear veteran political observers share insights into the presidential race and discuss potential impacts of the general election.</p>	<p>Soledad O'Brien Award Winning Journalist, Documentarian, Entrepreneur & Philanthropist</p> <p>David Brooks, Author and Op-Ed Columnist, The <i>New York Times</i> and Political Commentator</p> <p>David Gergen, Political Commentator and Former Presidential Adviser</p>

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October 8	Session Title	Session Objective	Speaker/Moderator
12:45: 1:00	Operator Spotlight: Knowledge is Power: Lessons from Ground Zero of COVID-19 Track: Senior Care Focus: Managing Margins	Topic: Knowledge is Power!	Speaker: Dwayne Clark Co-Founder and CEO Aegis Living Co- Facilitator TBD
1:00: 2:00	Seniors Housing's New Reality: Impacts and Ideas for the Forgotten Middle Track: Seniors Housing Focus: Managing Margins	<ul style="list-style-type: none"> • How has the economic crisis and the COVID-19 pandemic affected demand for middle income seniors housing? • What new or existing strategies exist for serving this growing cohort of seniors? • How can we keep investors' focus on this critically important market? 	Moderator: Torey Riso Independent Consultant Speakers: John Cochrane CEO, HumanGood James Lydiard Staff VP, CareMore Health Bill Pettit President, R.D. Merrill Company
	Overcoming PR, Sales & Marketing Challenges in the Covid- Era Track: Skilled Nursing Focus: Managing Margins	<ul style="list-style-type: none"> •How are industry participants effectively addressing evolving perceptions of senior care communities among consumers? •NIC data/research to show how property types are performing; how to address some of the headlines; discuss safety of seniors housing vs. the home setting. 	Moderator: Bre Grubbs SVP, Business, Leisure Care Speakers: Traci Build CEO, Bild & Co. Joe Kiernan Chief Strategy Officer, SVP, Network Development, Ocean Healthcare
1:30: 2:00	Insights from NIC's Executive Survey Track: Senior Care Focus: Managing Margins and Realizing Returns	<ul style="list-style-type: none"> •How COVID-19 impacted move-in & move-out rates, & changes in occupancy by care segment •Expectations for organization development pipelines •Usage of rent concessions to attract new residents •How organizations supported staff •Additional insights from respondents 	Speaker: Lana Peck Senior Principal NIC

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2:00: 3:00	<p>Sales vs. Risk: Balancing Operations and Finance in Seniors Housing</p> <p>Track: Seniors Housing Focus: Managing Margins</p>	<ul style="list-style-type: none"> •How are industry participants effectively addressing evolving perceptions of senior care communities among consumers? •NIC data/research to show how property types are performing; how to address some of the headlines; discuss safety of seniors housing vs. the home setting. 	<p>Moderator: Bre Grubbs SVP – Business Leisure Care</p> <p>Speakers: Traci Bild CEO, Bild & Co.</p> <p>Summer Blizzard VP of Sales and Business Optimization, Independent Healthcare Properties, LLC</p>
3:00: 3:15	<p>Operator Spotlight: Using Science to Fight Covid-19</p> <p>Track: Senior Care Focus: Managing Margins</p>	Topic: Environmental Testing	<p>Speaker: Fee Stubblefield CEO The Springs Living</p>
3:15: 4:15	<p>Communications with Staff, Residents and Families During the Pandemic: Lessons Learned</p> <p>Track: Seniors Housing Focus: Managing Margins</p>	<ul style="list-style-type: none"> •Best practices •Case studies highlighting the communication mode and technology utilized; •How did you determine what communication platform; •What's working; what proved too challenging 	<p>Speakers: Leigh Ann Barney President & CEO Trilogy Health Services</p> <p>Marilynn Duker CEO Brightview Senior Living</p>
	<p>Working Together to Support Older Americans: A Conversation with Industry Leaders</p> <p>Track: Senior Care Focus: Managing Margins</p>	<ul style="list-style-type: none"> •Hear from industry leaders to see what they have done to advocate for the seniors housing and care industry since the onset of the pandemic •Gain insight on the latest implications of future stimulus bills 	<p>Moderator: Brian Jurutka, President & CEO, NIC</p> <p>Speakers: James Balda, President & CEO, Argentum</p> <p>David Schless, President, American Senior Housing Association</p> <p>Katie Sloan, President and CEO, LeadingAge</p> <p>Scott Tittle, Executive Director, NCAL</p>
4:30: 5:00	<p>Closing Session</p> <p>Track: Senior Care Focus: Managing Margins</p>	Join us as we share highlights for Business Connection Week and showcase the Y@H senior choir	Young at Heart Senior Choir

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October 13	Peer-to-Peer Topic	Peer-to-Peer Objectives	Facilitators
1:00 – 2:00	Technology Focus: Managing Margins	Share alternative approaches of technology integration for residents and business operations	Zach Bowyer Managing Director/ Head of Alternatives, JLL Valuation Advisory
1:00 – 2:30	NIC MAP User Group Peer-to-Peer Discussion: Market Feasibility Focus: Realizing Returns	Join in a 90-minute interactive live video discussion with NIC MAP® Data Service Users. During this Peer-to-Peer session share best practices and ask questions on how data is used to perform a market feasibility analysis. -Best Practices for assessing a market's potential for new or existing property. -Critical factors to consider including defining a Primary Market Area (PMA), choosing the appropriate competitive set, determining existing and future demand, assessing accessibility and visibility of a property, examining PMA income and housing characteristics, and many other considerations.	Facilitator: Jamie Timoteo, MBA Senior Vice President Plante Moran Living Forward
2:15 – 3:15	What Does Senior Living Look Like in the COVID Era: The New Role of Health and Healthcare Onsite Focus: Managing Margins	Learn through shared experiences how we can develop relationships between housing and healthcare for residents	Facilitator: Ryan Brooks Senior Principal, Healthcare NIC
2:15 – 3:15	Staffing Challenges Focus: Managing Margins	Connect and build alliances with others on staffing challenges and how to navigate them	Allison Pendroy SVP/ Managing Director of Life Plan Communities Life Care Services
3:30 -4:30	Social Inequity and Its Impact on the Industry Focus: Managing Margins	Discover solutions to combat inequality for black or indigenous people of color who are front line staff which can result in a better outcome for overall business development	Facilitator: Stephani McDow Professional Development/ Diversity, Equity and Inclusion Consultant, Stephanie McDow Consulting
3:30 – 4:30	Capital Expenditures Structures and COVID, have they changed? Focus: Realizing Returns	Collaborate with peers by discussing appropriate budget types for different capital expenditures and the impact it has had due to COVID	Colleen Blumenthal COO/Managing Partner HealthTrust

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October 14	Peer-to-Peer Topic	Peer-to-Peer Objectives	Facilitators
1:00 – 2:00	Middle Market Focus: Managing Margins	Learn from other ideas and/or uncover strategies for serving our middle market seniors	Facilitator: Beth Mace Chief Economist NIC
2:45 – 3:45	Residents Social Isolation and Loneliness Focus: Managing Margins	Listen to approaches and provide insight on combatting resident isolation and loneliness.	Facilitator: Kris Woolley Founder & CEO Avista Senior Living
2:15 – 3:45	NIC MAP User Group Peer-to-Peer Discussion – Underwriting an Existing Asset Focus: Realizing Returns	Join in a 90-minute interactive live video discussion with NIC MAP® Data Service Users. During this Peer-to-Peer session share best practices and ask questions on how data is used to underwrite an existing asset. How do you assess a potential acquisition? What factors do you look at accessing market feasibility Operator Performance, Experience and Track Record	Facilitator: Susannah Myerson Vice President, Senior Housing Finance Wells Fargo
4:00 – 5:00	NIC Talks Focus: Managing Margins	During Education Week, attendees heard insights and perspectives from innovative thought leaders as they addressed how COVID-19 will impact the future of aging and aging services. Now share your perspectives during this Peer-to-Peer discussion, facilitated by Bob Kramer	Facilitator: Bob Kramer Founder & Strategic Advisor, NIC President, Nexus Insights
4:00 – 5:00	Workplace Culture Focus: Managing Margins	Share with industry peers what housing and skilled nursing operators are doing to attract and retain new talent while maintaining and healthy workplace culture.	Facilitator: Dennis Murphy Senior Director of Investment Benchmark Senior Living

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October 15	Peer-to-Peer Topic	Peer-to-Peer Objectives	Facilitators
1:00 – 2:00	What's the Investment Case for Seniors Housing Since COVID? Focus: Realizing Returns	Connect and share aspects on how the pandemic will result in a re-ordering of priorities for seniors housing	Ryan Chase Senior Managing Director & Head of Market Strategy Blueprint
2:15 – 3:15	Active Adult Focus: Managing Margins	Discuss through shared experiences the investor and developer interest and how active adult differ from other independent living products.	Facilitators: Aron Will Vice Chairman, National Senior Housing CBRE Capital Markets Austin Sacco First Vice President & CO-Production CBRE National Senior Housing
2:15 – 3:15	Effectively Opening Communities Focus: Managing Margins	With America reopening, share ideas on how we can safely and effectively reopen our communities	Facilitator: Jay Leo COO, The Springs Living
3:00 – 4:30	NIC MAP User Group Peer-to-Peer Discussion – Targeting Markets and Market Selection Focus: Realizing Returns	Join in a 90-minute interactive live video discussion with NIC MAP® Data Service Users. During this Peer-to-Peer session share best practices and ask questions on how data is used to target and select a market. Hear about portfolio consideration and geographic factors Explore demographic demand drivers, economic base, long term market conditions and market segmentation	Facilitators: Rachel Watson AVP- Research Welltower™ Inc. Swagat Banerjee VP – Business Insights Welltower™ Inc.
3:30 – 4:30	The Evolving Needs of Architecture and Design Focus: Managing Margins	Discover industry alliances as we share evolving architectural needs to build safe senior living communities	Facilitator: Lucas McCurdy Founder The Bridge Group

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