

NIC 2020 SPRING Conference

Investing in Seniors Housing & Healthcare Collaboration

March 4 - 6, 2020 | San Diego, CA

PRELIMINARY PROGRAM

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Forge Ahead

Join other decision-makers at the beautiful Marriott Marquis San Diego Marina as they convene to build the future.

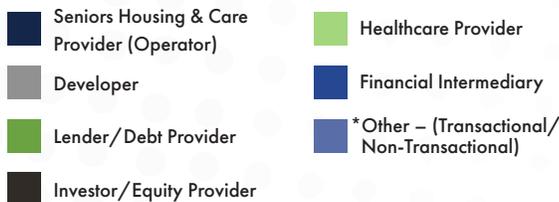
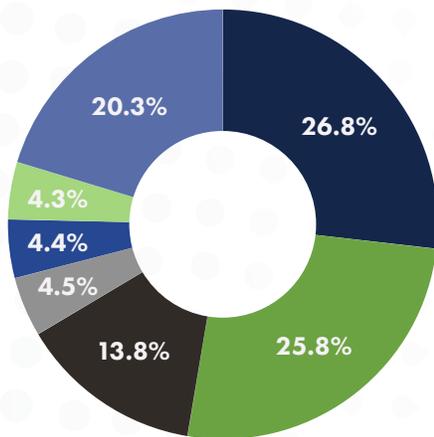
The 2020 NIC Spring Conference: Investing in Seniors Housing & Healthcare Collaboration is the only event dedicated to seniors housing and health care collaboration where you'll make lasting professional connections, expand networks, and explore potential partnerships to benefit your organization and America's seniors.

In San Diego, we'll tackle building efficiencies in value-based care collaborations while also providing the most recent trends on the real-estate based landscape. You'll hear how others are leading the way to prepare for — and effectively confront — the challenges of today and tomorrow in seniors housing and healthcare.

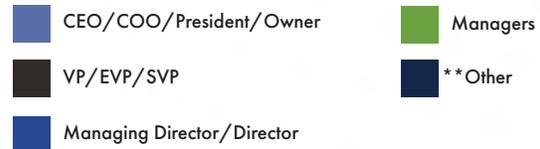
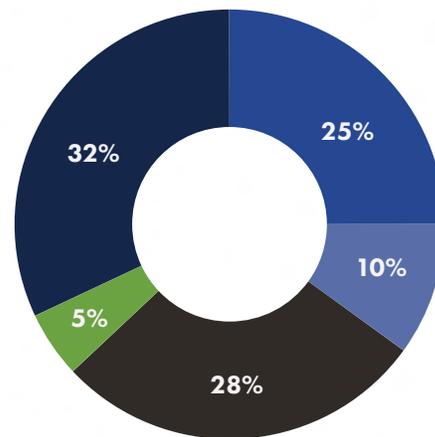
Who Attends

*Data from 2019

Attendees by Registration Type



Attendees by Title



Why Attend

Operators

Senior executives prize “the NIC” for highly effective and efficient networking, and for the opportunity to focus on what’s really driving their markets. In addition to the latest data and market analysis, the event features unparalleled opportunities to meet with potential new partners, including investors, payers, and new players from the healthcare space.

Investors

Interest in the sector continues to draw new sources of capital, but to succeed, it is essential to understand how the industry will adapt to the challenges that face it today. There is simply no other event that offers the efficiency of meeting with key players from every part of the sector, including potential new partners in healthcare, while accessing the most important data, analysis, and innovative solutions that will shape it for years to come.

Healthcare Providers

No other event connects as many leaders in seniors housing and skilled nursing with leaders in healthcare services. “The NIC” offers the opportunity to meet with senior-executive decision-makers, gain valuable data and market insights, and understand where opportunities to partner are most promising. It is a must-attend event for any healthcare-sector executive or strategist seeking to understand and forge relationships within the seniors housing and care sector.

Schedule At-a-Glance

Wednesday, March 4

7:00 AM – 6:30 PM	Registration
8:00 PM – 5:00 PM	braindates
1:45 PM – 2:45 PM	First-Time Attendee Power Hour
2:45 PM – 4:15 PM	Super Session
4:30 PM – 5:45 PM	Concurrent Sessions
5:45 PM – 7:15 PM	Welcome Reception

Thursday, March 5

7:00 AM – 5:30 PM	Registration
7:00 AM – 9:00 AM	Networking Breakfast
8:00 AM – 5:00 PM	braindates
8:00 AM – 9:30 AM	Morning General Session
9:45 AM – 11:00 AM	Concurrent Sessions
10:45 AM – 11:15 AM	Networking Break
11:15 AM – 12:30 PM	Concurrent Sessions
12:30 PM – 2:15 PM	Luncheon General Session
2:30 PM – 4:00 PM	Concurrent Sessions
3:45 PM – 4:15 PM	Networking Break
4:15 PM – 5:30 PM	Concurrent Sessions
5:30 PM – 6:45 PM	Networking Reception

Friday, March 6

7:00 AM – 12:00 PM	Registration
7:00 AM – 9:00 AM	Networking Breakfast
9:15 AM – 10:30 AM	Concurrent Sessions
10:30 AM – 11:00 AM	Networking Break

Networking Opportunities

CONNECT | COLLABORATE | CATALYZE

This March, plan to attend the industry's most unique and powerful opportunity to build relationships, expand networks, and create new partnerships.

Join your peers, thought leaders and notable executives from the owner/operator side, and the capital provider side in meaningful conversations to move the industries forward. In addition, a growing cohort of healthcare leaders will be onsite to explore potential partnerships as a means to improve outcomes for high-need, high-cost seniors, millions of whom reside in seniors housing and skilled nursing properties across the country.

Leverage the following opportunities designed to ensure everyone is able to connect efficiently and effectively throughout this one of a kind three-day event:



Networking Events

Meet new contacts and network with conference attendees.

- Breakfasts
- Receptions
- Networking Breaks

Networking Spaces

Extensive, unique, and comfortable networking areas for scheduled and impromptu meetings.



Attendee Resources

Everything you need to connect before, during, and after the conference.

- Attendee Listing
- Conference Mobile App
- Capital Provider Attendee Listing
- Conference Concierge
- Headshot Lounge
- LinkedIn Corner & Tech Support
- Relaxation Station
- Shoe Shine
- Meet-Up Points

First-Time Attendee

You'll have access to a number of activities and resources designed to help first-time attendees successfully navigate the conference, including:

- Orientation Webinar (Pre-Conference)
- First-Time Attendee Power Hour
- Morning Meet-Ups



What's New at the 2020 Spring Conference

Innovative Facilitated Networking at the 2020 NIC Spring Conference

Braindate

New this year, we're launching braindate, a platform that facilitates experiential peer learning. It can assist you in engaging in conversations with other attendees who share your interests or challenges for topic-driven, learning-focused conversations. Exploring partnership opportunities between healthcare organizations and seniors housing? Use braindate to break the ice and maximize your networking at the 2020 NIC Spring Conference.

NIC 2020 Spring Conference



Huddle Spaces

Reserve a dedicated Huddle Space. These reservable sections of the Networking Lounge offer an effective place to conduct your meetings as they provide a table, seating for six, power outlets, and storage for materials.

"Talk to Me About" Ribbon Wall

Once you've registered, visit the Ribbon Wall and select a topic to display on your conference badge, providing an effective ice-breaker for fellow attendees with similar interests.

Thematic Networking

Two major networking receptions will feature thematic and geographical drivers designed to encourage discussion. Wednesday night's reception will prompt discussions on seniors housing, skilled nursing, and healthcare collaboration. The Thursday breakfast will offer the opportunity to gather with attendees from your region of the country.

New Conference App Platform

Our new platform will further enhance attendees' ability to navigate all the 2020 NIC Spring Conference has to offer, including scheduling meetings with fellow attendees.

Networking Lounge Etiquette

As always, the conference is designed to provide high quality attendee interactions, in an organic, business-friendly environment. Attendees are requested to observe good networking etiquette, while observing the following policies:



- The only company signage or display materials permitted are those posted by NIC.
- Networking spaces must remain accessible and available at all times to all fellow conference attendees.
- Networking Lounges are accessible only by badged conference attendees.

Programming Overview

Overview

The focus of the 2020 NIC Spring Conference is to facilitate partnerships, create efficiencies, and improve organizational outcomes, as well as shed light on the innovations and solutions that will propel the seniors housing and healthcare industries into the future.

Investors, operators, owners, and developers, as well as a growing number of current and potential healthcare partners, attend the NIC Spring Conference to hear:

- The latest thinking on the future of the seniors housing and care sector;
- How challenges of a changing landscape can create new opportunities; and
- Why collaborative relationships are critical to success as the sector adapts to policy changes and demographic shifts.

This year's educational programming has three focus areas:



Real Estate Strategies (RES)

Market trends, capital flow into the sector, investing in seniors housing, skilled nursing, home healthcare and home care, valuations and workforce issues.



Healthcare Strategies in Real Estate (HSRE)

Financial alignment, partnership financing structures, key drivers for valuation, changes to valuation and cap rates.



Senior Care Collaboration (SCC)

How to achieve care coordination, win managed care business, form partnerships, create a high-performance network, and approach the challenges and opportunities of taking risk.

Session Formats

Specialty Programming

Sessions that present industry topics in creative formats.

General Sessions

Keynote Address and a Moderated Discussion.

Concurrent Sessions

75 and 90-minute presentations and panel discussions.

Continuing Education Units (CEUs)



For some sessions, NIC will offer CEU credit hours through the National Association of Long-Term Care Administrator Boards (NAB/NCERs).



General Sessions

Morning General Session | Thursday, March 5 | 8:00AM – 9:30AM

Join the Disruption: Convergence of Healthcare and Seniors Housing

Healthcare delivery and payment models have entered a period of disruption. This disruption is causing traditional players in the healthcare system to rethink their models as they look to provide better outcomes for lower cost. Healthcare players traditionally involved in creating networks to provide acute care are expanding to emphasize wellness, care coordination, and management of chronic conditions to prevent acute care episodes. This creates new opportunities for seniors housing and care providers who are willing to adapt. As new entrants and unusual partnerships continue to emerge, old silos separating healthcare and seniors housing are breaking down.

NIC Founder & Strategic Advisor, Bob Kramer, joined by David Nash, M.D., founding dean emeritus, College of Population Health at Thomas Jefferson University, Will Shrank, M.D., chief medical & corporate affairs officer at Humana, Inc., and Dan Lindh, President & CEO, Presbyterian Homes & Services, will offer expert insights into why changes in healthcare delivery and payment models are occurring; how partnerships, including partnerships with seniors housing, can slow the rising trajectory of healthcare costs and improve healthcare outcomes for high-need, high-cost frail elders; and how partnerships with healthcare providers and payors can generate revenue for seniors housing providers while improving resident quality of life and length of stay.



Bob Kramer



David Nash



Will Shrank



Dan Lindh

Luncheon General Session | Thursday, March 5 | 12:30PM – 2:15PM

Positioning for the Long Term: The Opportunity for Integrating Senior Care

All industries experience change over time. This process is called Disruption. Disruption is triggered by many factors: changing competitive forces, technological advances, or evolving consumer preferences. Regardless of its origin, Disruption happens. Anticipating and preparing for Disruptive change can mean the difference between a company's growth—or its downfall.

Andy Waldeck, senior partner at the growth strategy consulting firm Innosight, will build on the insights from the morning's general session panel discussion on innovative partnerships between seniors housing and healthcare. He will discuss why the current senior care ecosystem is not currently optimized, how seniors housing sits at the nexus of healthcare transformation, and the tremendous growth opportunities created by Disruption.

With more hospital discharges now going to home health than to skilled nursing, healthcare at home is already a reality. Waldeck addresses the challenge for seniors housing providers: how to create business models designed to deliver improvements in affordability, access and quality, and why now is the time to start experimenting with better coordination and truly personalized experiences.



Andy Waldeck

Session Highlights

Wednesday, March 4

2:45PM – 4:15PM

Five Healthcare Trends You Need to Know (SCC)

Healthcare is changing. Driven by unsustainable spending and cost growth, providers, payors, regulators, and consumers are energizing a number of trends that will increasingly impact the seniors housing and care industry. Senior executives and investors in healthcare, seniors housing, skilled nursing, and managed care spaces must look outside their respective industries and understand these larger trends in order to develop effective long-term strategies – and remain relevant in the future.

4:30PM – 5:45PM

Telehealth: Boon or Threat to Senior Care (SCC)

Driven by advances in technology, the removal of legal and regulatory roadblocks, and increasing pressure to improve outcomes at lower cost, the adoption of telehealth is sharply rising, and its use cases are expanding. In seniors housing and care, the use of telehealth services will change how staff, residents, and health care providers interact, impacting staffing, cost of care, site of care, and investment returns.

Senior Care & Housing Report Cards: Understanding How Quality Health Care Delivery is Impacting ROI (HSRE)

Driven by changes in Medicare, the world of healthcare is significantly affecting the way the seniors housing and care sector must do business. Referral volume and length of stay will increasingly depend on the value that seniors housing and care operators can contribute to the healthcare delivery system and reimbursements will also be influenced by performance. Investors must gain an appreciation for the impact of healthcare performance indicators on their ability to evaluate investment opportunities.

Equity and Debt Financing in Private Pay Seniors Housing & Skilled Nursing (RES)

Operators and developers in the private pay seniors housing and skilled nursing markets are often looking for partners who can help them achieve their financing goals. With many options available, both in equity and debt financing, how do operators and developers assess potential sources of capital and understand which deal structures are best for them?

Thursday, March 5

9:45AM – 11:00AM

Collaboration or Competition: Who Owns the Healthcare Dollar? (SCC)

As hospitals and health systems enter risk-sharing agreements with payors, seniors housing and care facilities are facing increased pressure to improve quality while decreasing costs, with little more than a promise of increased referrals in return. In response, some operators are changing how they portray their own value in order to win a greater share of the healthcare premium dollar. Payors, as well as high level strategic and operations executives in seniors housing, skilled nursing, and related providers will want to attend this session, as it delves into how the seniors housing and care sector can collaborate – and compete – in a value-based world.

PDPM: Five Months In (HSRE)

The new Patient Driven Payment Model (PDPM) represents a substantial change in the way that Medicare Part A reimburses skilled nursing facilities. Because the clinical model is now driving reimbursement, rather than therapy minutes, PDPM is impacting the skill sets SNFs and other providers of clinical care to frail elders will need, going forward. This session is designed to update skilled nursing, seniors housing, and other post-acute providers, as well as lenders and equity investors, on the first five months of PDPM implementation, and to provide insight on how to adapt and get the most out of the new system.

Session Highlights

Thursday, March 5

11:15AM – 12:30PM

What's the Physician's Role in the Value Equation? (SCC)

As healthcare continues to push services out to where seniors live, and payment models are increasingly enabling, and rewarding, onsite physician services, seniors housing and care operators and investors are exploring the role of the physician as they adjust care models. Primary care physicians are an important component of any care model that integrates healthcare delivery into senior living, and their presence onsite is viewed positively by residents, families, and referral sources, seeking value and quality of care.

Project Healthcare: Designing Integrative Care Models That Work (HSRE)

Based on "project runway," the session will feature three real-world healthcare models, each presented by their "designers," with the use of visual models. A panel of advisors, representing capital, operations and healthcare, will pose questions to the presenters about their integrative care models based on: innovation, applicability to seniors housing, ease of replication, value, and market differentiation. The audience will also participate by asking questions – and choosing which model is most suited to their own needs.

2:30PM – 3:45PM

Executing a Payroll Play: How Labor Strategies Factor into Investment Decisions (RES)

Labor comprises the largest expense on a seniors housing property's income statement. Yet, despite its effect on NOI, it is challenging to understand an operator's labor strategy by analyzing data. At this session, attendees will learn the questions to ask, information to request, and analysis to complete to effectively underwrite labor when assessing an investment opportunity.

Planning for the Care Needs of the Forgotten Middle (HSRE)

The Forgotten Middle is a fast-growing and hugely significant demographic group of seniors that demands attention and planning. By 2029, there will be 14.4 million middle-income seniors in the U.S., many with financial resources that disqualify them for subsidized programs but too little to afford today's private pay options. Three out of five of them will have mobility needs, one in five will be high needs with multiple chronic conditions combined with functional limitations. This session will focus on the socio-economic profile of America's middle-income senior and their care needs. How can our industry serve this cohort not just with housing but also with care and other supportive services? How can we help to lower the overall costs of care while meeting fundamental housing, socialization and care needs? What role will population health management play? Who might be the sources of equity for these communities and what are the potential cost-effective strategies to meet the care staffing challenges?

4:15PM – 5:30PM

Value-Based Strategy: Partner, Build or Acquire? (HSRE)

Leading providers are pursuing a variety of vertical integration strategies as they seek to gain a competitive edge with referral sources and payors in a value-based world. Expanding lines of service not only improves delivery on the "triple aim" of better outcomes, lower cost, and better resident experience, but can boost reimbursement, lower operating costs, mitigate exposure to penalties, and diversify regulatory risk.

Identifying Value Amidst Turbulent Market Conditions (RES)

Overbuilding, wage pressures, occupancy declines, stagnant fill-ups, weak rate growth, rate concessions and changes in reimbursement have led to compressed margins and, in some cases, declines in profitability. At the same time, a drive for yield has led to strong demand for Class A assets. Investors, operators, lenders, and developers will leave this session with a better understanding of how these cyclical factors impact value.

Session Highlights

Friday, March 6

9:15AM – 10:30AM

Operators and The Capital Providers Who Love Them (HSRE)

In order for capital providers to yield a return, their operators must perform well. In this age of healthcare reform, however, operators are harder than ever to evaluate, and they often struggle to communicate their performance capabilities and share appropriate data. Senior living and SNF operators, capital providers, health systems, and ancillary providers will benefit from a “Phil Donohue” – style format in which panelists from a real and recent deal tell all, and the audience gets to ask the questions.

The NIC Bluebook: Current Market Conditions and the Senior Care Industry (RES)

How will the economy affect the seniors housing & care sectors? Are we heading into a recession? Where are interest rates headed? Will consumer confidence shift? NIC Chief Economist and Director of Outreach, Beth Burnham Mace, will present data and analysis on a range of macroeconomic factors that will affect the sector, providing investors, operators and providers insights as they plan for 2020 and beyond. She will discuss the risk of an economic downturn, interest rates, market performance, and what the latest NIC MAP data can teach us. In addition to indicators such as unemployment rates, job growth, wage growth, consumer confidence and housing activity, the presentation will review recent movements in the yield curve. A longer-term perspective with a discussion of demographic trends for the next few decades and the implied needs for new supply will round out the session.

“In this healthcare transformation, our success depends on resiliency, innovation, collaboration, and engagement.”

- Senator Tom Daschle



Sponsorship

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Download the [2020 NIC Spring Conference Sponsorship Prospectus](#).



Thank You To Our 2019 Sponsors

The support of our sponsors helps NIC deliver its mission through research, analytics, data, education, and connections that increase transparency in the seniors housing and care sector.



Attending the 2020 NIC Spring Conference

Register to Attend

Visit www.NICevent.org for more information about the 2020 NIC Spring Conference.

Small Operators

Discount rate available for small providers of care/care management. Contact us to inquire about pricing.

Questions? Contact NIC Registration
Phone: 410-267-0504 | Email: registrar@nic.org



About NIC

The National Investment Center for Seniors Housing & Care (NIC), a 501(c)(3) organization, works to enable access and choice by providing data, analytics, and connections that bring together investors and providers.

NIC collects and reports timely quarterly and monthly data from seniors housing and care properties throughout the country through its NIC MAP® Data Service, featuring data products such as market fundamentals time-series data on 140 metro markets, the seniors housing actual rates initiative, and the Skilled Nursing Data Report. NIC's two annual events—the NIC Fall Conference and the NIC Spring Conference—are the marquis networking opportunities of the seniors housing and care sector.

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