Innovating Across Senior Living and Care: Insights from 2017 CIHF Senior Living Roundtable

Sherrie Negrea

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Abstract
The second Cornell Institute for Healthy Futures (CIHF) roundtable, held in March 2017, brought together senior-level executives, educators, and leaders in senior housing and care to share experiences and exchange ideas. CIHF roundtables are purposely limited to approximately 25 to 30 participants “at the table” to foster discussion on a more intimate basis than traditional conferences. In addition to the formal participants, students, faculty, and guests observed and interacted during the event and attended a separate panel discussion and reception the evening before. Students, faculty, and industry leaders also met together at a working luncheon session to brainstorm ideas for recruiting and training young talent for careers in the senior housing and care industry.

Keywords
senior living, health management, senior housing, health care, housing design, health facilities, Cornell University

Disciplines
Environmental Design | Gerontology | Health and Medical Administration | Human Resources Management

Comments
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2017 Cornell Institute for Healthy Futures Roundtable
Innovating Across Senior Living and Care
The second Cornell Institute for Healthy Futures (CIHF) roundtable, held in March 2017, brought together senior-level executives, educators, and leaders in senior housing and care to share experiences and exchange ideas. CIHF roundtables are purposely limited to approximately 25 to 30 participants “at the table” to foster discussion on a more intimate basis than traditional conferences. In addition to the formal participants, students, faculty, and guests observed and interacted during the event and attended a separate panel discussion and reception the evening before. Students, faculty, and industry leaders also met together at a working luncheon session to brainstorm ideas for recruiting and training young talent for careers in the senior housing and care industry.

Exploring Ideas from Hospitality, Health Management, and Design for Senior Housing and Care: Insights from 2017 CIHF Senior Living Roundtable

Reported by Sherrie Negrea

Roundtable chaired by Brooke Hollis, MBA/Sloan ’78
What will senior housing and care look like ten years from now? By the late 2020s, the first baby boomers will have reached the age of 82, a key milestone as the average age for moving into rental senior housing is now between 82 and 87. Baby boomers will redefine retirement communities by, first of all, insisting these facilities not be called “senior housing” since they are less likely to buy into any type of housing that identifies them as “seniors.” These new retirees will move to developments where they can engage in lifelong learning, participate in health and wellness programs, and pursue cultural and educational activities in the larger community. Instead of disengaging from the world, baby boomers in their last chapter of life will find their purpose and their passion, or continue their careers part-time.

How senior housing and care facilities will adjust to this fundamental demographic change was a focus of a roundtable sponsored by the Cornell Institute for Healthy Futures (CIHF), held March 30 to 31 at the Statler Hotel at Cornell University. The roundtable drew 29 leaders in the senior care and housing sector, representing both for-profit and not-for-profit service providers, researchers, planners, architects/designers, consultants, investors, and insurers.

“Boomers, for the most part, won’t retire — they’ll transition — and that has huge implications for the settings and the level of engagement that we provide,” said Robert Kramer, founder and CEO of the National Investment Center for Seniors Housing & Care in Annapolis, Md. “They won’t move into anything with the words ‘senior’ or ‘retirement,’ and if you truly want to insult them, use the phrase ‘senior care,’ because boomers and senior care are two contradictory phrases. They’re at war with each other.”

With that context, the CIHF roundtable proceeded to explore a number of themes, including the recruitment of young people to the field, innovations in design, changing demographics for senior housing, and financing models for senior communities and services, now and in the future.

Design Ideas That Have Worked

One way to learn how senior housing facilities are adapting to the changing preferences of today’s retirees is to look at communities that have been extensively renovated in the past few years. A prime example is Kendal at Ithaca, a retirement community just a couple of miles north of Cornell which underwent a $29.3 million expansion and enhancement project over the past two years.

When Kendal at Ithaca was built in 1995, it was the first Continuing Care Retirement Community (CCRC) in New York State. But by 2012, the facility needed to reposition itself to meet the changing market for senior housing, so it launched a redevelopment that added 24 new independent living apartments, a new 48-bed skilled nursing center, a new café and fitness center, and renovations to offices, dining rooms and other common areas.
Before starting the project, the senior community began a process of determining where it was on the scale of residents’ lifestyle choices and how it was meeting their needs for health and long-term care, said Daniel Governanti, executive director of Kendal at Ithaca. The retirement community wanted to attract people who are 75 and older and meet certain income levels.

One of the major draws for seniors considering moving into a community is sustainability, a concept that goes beyond energy usage and focuses on other issues, such as whether the community is walkable. In Kendal’s case, all of the new buildings constructed during the project were certified as LEED (Leadership in Energy and Environmental Design) Gold ratings.

The development of green buildings at Kendal dovetailed with previous research that showed residents are willing to pay up to 10 percent more for project costs if the senior community is designated as sustainable, said Joseph Hassel, principal at Perkins Eastman, the firm that did the master planning, architecture, and interior design for the Kendal expansion. “When we asked why in surveys, the reason given is to protect the environment for their grandchildren and the next generation,” Hassel said.

People moving into retirement communities also want to know that they will have opportunities to participate in intellectually stimulating activities such as book clubs, lectures, lifelong learning of new skills and a variety of physical activities. In addition, they are seeking a sense of community, even though they won’t own their own unit, since “this is their home for the rest of their life,” Governanti said.

One key factor in how prospective residents view a senior community is the first impression they get by walking in the front door. For that reason, Kendal, in its expansion project, created a welcoming new entrance and reception area filled with natural light.

“Realize that those first impressions — the website and the first time people come onto your campus — is a substitute for how they evaluate quality and how they evaluate whether you are you living up to your message,” Governanti said. “You have to really work hard at that. People make those judgments, and they’re not telling you about it. You see the proof if you’re getting new residents coming in, showing interest and signing up. If not, you had better be looking at those first impressions.”
Another focus of retirement communities is the transformation of dining options. Many senior living facilities are adding all-day dining, which provides a central place for residents to socialize, watch television, or play board games throughout the day. All-day dining also addresses different eating schedules residents may have and eliminates the problem of residents showing up for breakfast or lunch when the dining room is closed.

Kendal had planned to transform a new café in its expansion into an all-day dining center, but ultimately decided it couldn’t afford it. One consideration is whether more customers would stop by, which would allow the hours to be increased, Governanti said. The solution Kendal arrived at was to keep the café open for residents to gather, without offering meals throughout the day. What can make all-day dining work financially, Hassel said, is to partner with a local business to sell food on the premises. “It’s not so much different than using Starbucks,” he said. “It’s grab and go. It’s not a full menu that’s available all day.”

Throughout its expansion project, one aspect of Kendal that did not change was its emphasis on lifelong learning. The focus at Kendal is to allow residents, through their own committees, decide what activities they want, whether it’s inviting speakers from the community to the campus or starting a new wellness program.

Mary Tabacchi, a professor emerita at Cornell’s School of Hotel Administration who lives near Kendal, noted that the senior development is viewed in the surrounding village of Cayuga Heights as a community center that hosts Rotary meetings, holds forums on neighborhood issues, and serves as a polling place in local elections.

“I think that is so key for both the residents and the community,” Tabacchi said. “I think that a living community center is so important, and I notice you keep doing it.”

Offering activities that serve residents who not only live on the premises but also in the neighborhood is central to the way Kendal operates, Governanti said. “We are open,” he said. “We don’t want to be seen in the community as that ‘rich place up on the hill for old people.’ We try to engage everybody.”

Defining Your Customers and What They Want

The senior housing industry is now focused on serving people in their 80s. The typical assisted living resident is a woman who is about 87 years old, who is mobile, who needs assistance with two to three activities of daily living, and who has two to three chronic conditions, according to an overview of studies published by The National Center for Assisted Living.

This trend in the industry has created a vacuum in the housing options for people in their 70s, said Kramer, CEO of the National Investment Center for Seniors Housing & Care. Demand for this niche in senior housing is growing, especially since there are 10,000 baby boomers turning 65 everyday. Innovative ideas about developing housing for this market include creating multi-family developments and senior living that is designed around improved hospitality services—an area of interest of the roundtable sponsor, the Cornell Institute for Healthy Futures.
Another transformation in the senior housing and care industry focuses on a new approach to aging, which Kramer calls the “engagement view.” This concept replaces the philosophy of retirement that centered on a “declinist view,” based on the literal definition of the word “retire,” which is derived from the French word “retirer” and means “to withdraw.”

“Just think of the contradiction of that in terms of boomers,” Kramer said. “They don’t go away quietly from anything. But to retire, you disconnect, and in some instances that’s literal. You’re disconnected from the office Internet; you’re disconnected from all work associates and the work that gave you some sense, hopefully, of purpose and meaning. You disconnect and you disengage. The view is it’s an inevitable period of decline, which ends up with an ultimate form of final disappearance, which is death.”

By contrast, in the “engagement” model, retirees aren’t only thinking about where they want to retire, but how they want to age. The question becomes what will they do next in their lives and how they can remain active in their communities, an exploration captured in the trend toward retirees hosting “transition” rather than “retirement” parties.

As Kramer summarized, to attract the baby boomer market, senior housing facilities may need to abandon the development of affinity housing, based on faith-based groups or military officers, and offer options that are defined along a focus on “purpose and passion.”

“I see retirement communities — which won’t be called that — where people live who are proud that their communities are engaged more philanthropically and are driving what’s happening in the arts and culture and education in their city more than any other,” Kramer said. “It becomes almost competitive to be there because that’s the place that’s really driving what’s happening in education in our city, or that’s the community that’s really supporting, particularly when governments are pulling back, the arts and arts education and those sorts of things.”

What’s also critical in enabling retirement communities to attract baby boomers is creating an atmosphere that resembles home. Among the top six attributes of why people live in senior housing, the most popular reason given is whether residents feel like they’re at home, said John Rijos, SHA ’75, chairman and CEO of CPF Living Communities and co-founder and operating partner of Chicago Pacific Founders, a private equity firm that specializes in investment across the healthcare spectrum.

“If it is their home and they love it, they wind up bringing their friends and other people to their communities, and they’re your best ambassadors,” Rijos said. “So it’s really important to understand that.”

About 10 percent of the elderly live in senior communities — excluding those in skilled nursing. This creates a marketing challenge in convincing the rest of the population to consider senior housing, Rijos said.

“If that’s the world we live in today, we’re all fighting for that 10 percent, instead of expanding that pie,” he said. “Expanding the pie is part of what we should be doing in giving people a better understanding of what senior living is all
about. It’s not your great-grandmother’s skilled nursing home. It’s a whole new place.”

In today’s model of senior housing, healthcare, hospitality, and real estate are merging. One of the major priorities in the industry is managing the 5 percent of Medicare recipients who account for 50 percent of all Medicare spending, Rijos said.

“For senior living, if we position ourselves properly and actually are part of the system, it can not only be a great place for people to live and prosper and be purposeful,” Rijos said. “It can actually be a place where health systems are about to start thinking about us as a low-cost environment and a better way to help people be successful as seniors.”

One way senior housing communities can ensure better health outcomes for their residents is by offering a range of health and wellness programs. Tabacchi asked who in the hierarchy of the senior housing industry is responsible for providing these types of fitness programs, particularly to help the elderly build muscle mass.

Encouraging seniors to participate in exercise programs, however, can be a difficult proposition.
reasons such as readmission penalties and other aspects of “value-based” care models, which are unlikely to disappear no matter what the changes are in federal healthcare legislation.

One roundtable participant, Lynne Katzmann, reported on an innovative program implemented by her company, Juniper Communities, called Connect 4 Life. The program has received positive reviews and has significantly impacted both hospitalization and readmissions as well as management of residents’ health. Based on comments from the participants at the roundtable, it is likely that we will see more activity in this area—something that can add value to both residents and to the health system.

**Financing and Paying for Senior Living**

A major obstacle for people considering moving to a retirement community is that senior housing is focused on the upper end of the income scale. The income of people who can pay for senior housing on their own or have long-term care insurance is typically $100,000, with a net worth of $300,000 to $400,000, said Tom McInerney, president and CEO of Genworth Financial, the largest long-term care insurance company in the country.

Only 8 percent of working-age Americans have long-term care insurance that will help cover the cost of nursing care, which now averages $92,000 annually for a private room, McInerney said. The cost of living in a nursing home is also growing at a rate of 4.2 percent a year. By the time baby boomers reach 80 in about 20 years, the cost for a private room will have reached $180,000.

Another financial factor to consider is the cost of care for seniors who have severe dementia or Alzheimer’s. For people who live to 85, the odds of coming down with severe dementia or Alzheimer’s are 43 percent, McInerney said. “With all the focus on healthy living, you may bend that somewhat, but I think that the reality is that those kinds of diseases are increasingly going to be soaking up a lot of government entitlement programs,” McInerney said.

The challenges are steep for baby boomers who may need to pay for long-term care. Currently, half of baby boomers have an average savings of $100,000, while a third of baby boomers have saved less than $50,000, McInerney said. “The reason we’re going to see a lot of baby boomers working into their 70s and 80s is because they have to,” he said.

Compounding the problem is the financial insolvency of the social security system. When social security was started in 1935, there were 35 workers generating payroll taxes for every retiree. Now there are 2.1 workers paying into the system for every retiree. That imbalance has created a current unfunded liability of $104 trillion, McInerney said.

Government commissions and other independent groups studying the problem have proposed various solutions. One is to allow penalty-free withdrawals from retirement accounts to pay for long-term care insurance. Another idea is to require employers that hire 50 or more people to offer long-term care insurance, unless...
the employees decide to opt out, as is the case with 401(k) plans. In addition, an alternate plan is to have private catastrophic insurance cover a portion of long-term care costs for about $1,500 a year.

Yet another approach is to focus on behavioral strategies that have been shown to reduce the onset of Alzheimer’s and severe dementia.

Studies have shown that people who are at higher risk of contracting these diseases can delay the onset by an average of five years, and as much as 10 years, through lifestyle changes, Kramer said.

“What that means is that not only is it a major dollar savings, but you are also more likely at that advanced age to die of something else, which is what most people would prefer,” Kramer said.

Owners and operators of senior housing facilities could use this research as a marketing tool to promote the benefits of living in senior communities, McInerney said. “If you look at healthy lifestyles, eating and nutrition are important, and exercise is important, but the number one factor by far is social interaction. So

I do think you can use some of those statistics to show that you are better off in a community — even though most people want to live in their own home — because of social interaction.”

This research has also been reported by Cornell researchers including Karl Pillemer, the Hazel E. Reed Professor of Human Development, who has studied improving care in aging services and has written five books that have been used in the field.

As McInerney pointed out, it is clear that senior housing facilities offer numerous advantages to people who want to lead a healthy lifestyle, remain active in their community, and socialize with other retirees. This is supported by research not only in the delay of Alzheimer’s and dementia, but also from the satisfaction that seniors manifest in continuing to live purposeful, full lives in their retirement communities.

As we look to the future, senior housing and care providers will continue to explore a wide range of solutions to address the challenges faced by the baby boomer generation and others as they enter retirement and beyond.

For additional information on CIHF programs, please contact the institute at CIHF@cornell.edu.
One of the challenges the senior housing and care industry faces is attracting more young people to enter the profession. By 2025, the industry will need to recruit 1.2 million employees to fill new positions and replace retiring professionals, according to Argentum, a national trade association that serves senior living communities.

Two events were held at the Cornell Institute for Healthy Futures Senior Living Roundtable from March 30 to 31 to address the issue of how to make careers in the industry more appealing to young people.

The first was a panel discussion on careers in which eight industry leaders spoke about the rewards of working in senior living and care to a group of Cornell students and roundtable participants. One theme that emerged is that young people can carve their own path in the field and work in a diverse array of areas, including management, nutrition, direct care, operations, and financing.

“It’s very rare to have an opportunity to be in a field where you’re making a difference on a very individual and very personal level in the lives of one person and one family, but at the same time, you’re making connections to a huge social issue that will be a defining issue for this country and for many countries across the world,” said Robert Kramer, founder and CEO of the National Investment Center for Seniors Housing and Care, a non-profit education and resource center.

Helping seniors find purpose and meaning as they age is a unique opportunity that working in senior housing and care offers, said Jill Vitale-Aussem, MMH ’96, chief operating officer of Cappella Living Solutions, a consulting and third-party management firm serving the industry.

“Rather than asking who somebody was when they move into our communities, what we say is, ‘What’s next?’” Vitale-Aussem said. “What are you going to do to continue to give back to this...”
community and to this world? When you have no purpose anymore, you have nothing to live for. It’s really about changing that conversation.”

The ability to advance quickly in the industry is another advantage that could attract more young people to the field, said John Rijos, SHA ’75, co-founder and operating partner of Chicago Pacific Founders, a private equity firm that specializes in investments across the healthcare spectrum.

“We can show you a career path where you can be an executive director in four or five years, and you can own your own community in ten years. You can become a national CEO and change agent for this business.”

While the industry offers vast opportunities for young people, the panelists agreed that they need to communicate the benefits of working in the industry more effectively. That may mean not only speaking to college students, but also to high school and middle school students, said Denise Boudreau-Scott, MHA ’94, president of Drive, a firm that helps aging services organizations improve the resident and staff experience.

“We need to have a standard presentation and even go into high schools and middle schools to say that this is an industry to be in,” she said. “We know this is an incredibly growing field and there’s tremendous opportunity.”

The career panel, held in Cornell’s Statler Hall, was chaired by David Schless, president of the American Seniors Housing Association. The panelists included leaders from Enlivant, The Vinca Group L.L.C., and Kendal at Ithaca.

The second activity on the following day was a working luncheon discussion where students and industry leaders came up with several strategies to recruit and train talent to work in senior housing facilities.

To make sure the ideas and insights are available for future use in classes and for individual student research, the panel discussion was videotaped and is available via the CIHF website (HealthyFutures.cornell.edu) or directly at cornell.videonote.com/videos/1000648/play.
As one participant in the working luncheon said, “A big part of the compensation is the emotional paycheck. You need to deliver that regularly like another paycheck. Deliver the emotional paycheck — ‘I’m doing this because I care about making a difference and if I don’t feel that way, then I won’t feel engaged.’ ”

Carly Andrews, SHA ’16, incoming operations associate at Erickson Living: “You get the emotional paycheck as well as the financial paycheck. I know that every day I’ll get to go to work and make a difference in someone’s life.”

Their ideas included:

- Create a central clearinghouse of information about job openings in the industry.

- Create a fellowship program similar to what hospitals now use for external employees to have a formal program that includes rotating through different positions to gain experience in the field and that offers a leadership development track for new graduates.

- Develop more structured programs for career advancement in the field, using career development programs in banks and hospitality companies as models.

- Focus on the unsung heroes in senior care facilities, and not only on the top-performing and poorly performing employees.

- Provide incentives to employees, such as end-of-year bonuses, tips from resident families, or opportunities for learning advanced knowledge about facility management.

- Focus on training the leadership staff so that they will create policies that motivate front-line employees to offer better customer service.

- Create an identity for the staff that motivates and inspires them.
Appendix

Cornell Institute for Healthy Futures
Innovating Across Health, Hospitality, and Design

2017 Roundtable: 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

Denise Boudreau-Scott, MHA ’94, President, Drive
Gabriel Corredor, 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

5:30 – 7:00 p.m.  Welcome Reception  Carrier Ballroom, Statler Hotel

Introductions of participants
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)
2017 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**  
Carrier Ballroom

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

**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**  
**Brooke Hollis**, MBA/Sloan ’78, Associate Director Sloan Program in Health Administration & Cornell Institute for Healthy Futures

**11:45 a.m. – 12:00 p.m.**  
**Photo of Roundtable Participants**
12:00 – 1:00 p.m.  **Training and Careers Luncheon and Discussion**  
*Rowe Room*

*How to Recruit and Train Talent – especially given new competition*

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*
Roundtable Chair

Brooke Hollis, MBA/Sloan ‘78
Associate Director, Cornell Institute for Healthy Futures
Associate Director, Sloan Program in Health Administration
College of Human Ecology, Cornell University

Participants

Elizabeth Classen Ambrose
Proprietor, Bridges Cornell Heights

Kelly Andress
President, Sage Senior Living

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

Denise Boudreau-Scott, MHA ’94
President, Drive

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

Daniel Governanti
Executive Director, Kendal at Ithaca

Esther Greenhouse, BS ’93, MS ’03
Environmental Gerontologist, Esther Greenhouse, LLC

David Gress
Regional Vice President, Sodexo

Joseph Hassel
Principal, Perkins Eastman

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

Lynne Katzmann
President and CEO, Juniper Communities

Steve Kramer
President and CEO, The Mayflower Retirement Community

Robert Kramer
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Corinna Loeckenhoff
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Tom McInerney
President and CEO, Genworth Financial

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Vice President of Acquisitions and Business Development, Mainstreet Health Investments

Cate O’Brien
Director of Research, Mather LifeWays

John Peters
Senior Vice President, Senior Star

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

Dave Schless
President, American Seniors Housing Association

James Sherman
Senior Vice President, Dougherty Mortgage LLC

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

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

Jill Vitale-Aussem, MMH ’96
Chief Operating Officer, Cappella Living Solutions
Innovating across health, hospitality, and design to create a...