



A Focus on Finance: Strategic Positioning & Foresight

November 2, 2022

9:00 am - 3:30 pm

Join national experts and your Ohio colleagues for a day of financial strategy. Whether you are rethinking nursing facility beds or considering partnership for home and community-based services, this workshop will prepare you with the latest trends and big ideas and help you make the most of uncertain times. Participants will leave with tangible strategies they can employ to position their organizations for success.

Quest Conference Center
9200 Worthington Road
Westerville, OH 43082

Intended Audience:

- CEOs
- CFOs
- Administrators
- Senior VPs

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thank our sponsor:*



Ziegler

CAPITAL :: INVESTMENTS :: ADVICE

PROGRAM AGENDA

8:30 - 9:00 a.m. Registration/Continental Breakfast

9:00 - 9:15 a.m. Welcome/Opening

Susan Wallace, LeadingAge Ohio

LeadingAge Ohio will welcome attendees to the CFO Workshop and will set the stage for the day.

9:15 - 10:00 a.m. State of Senior Living

Tom Meyers, Sr. Managing Director; Lisa McCracken, Director, Sr. Living Research, Ziegler

This opening session will provide attendees with an overview of the latest trends, research and provider best practices from the field of senior living and care. Presenters from Ziegler will share industry-specific information along with national, regional and state examples for topics such as demographic trends, workforce and expense pressures, growth, joint ventures and partnerships, industry consolidation, home-based services and technology to name a few. Data from this session will also provide a framework for a deeper dive into a number of these key issues throughout the day.

10:00 - 11:00 a.m. Revenue Diversification

John Renner, Chief Finance & Administrative Officer, United Church Homes; Brian Krause, Chief Financial Officer, Community First Solutions

Nearly all providers are looking to diversify income streams and explore meaningful alternatives to supplement community and facility-based service lines. This session will feature providers who have successfully ventured into multiple service lines and innovative growth ventures.

11:00 - 11:15 a.m. Break

11:15 a.m. - 12:15 p.m. Three Big Ideas in Senior Living Finance 2022

Tom Meyers, Sr. Managing Director, Ziegler; Ann O'Malley, Chief Financial Officer, Kendal at Oberlin

Coming off of two years of historically-low borrowing rates, the sector has undergone greater disruption in 2022. This session will delve into financing strategies for the near-term and how organizations can prepare for capital needs throughout 2022 and into 2023.

12:15 - 1:00 p.m. Networking Lunch

1:00 - 2:00 p.m. Positioning for Sustainability in Skilled Nursing

Bob Stillman, Chief Financial Officer, Ohio Living; Deb Emerson, Principal, CliftonLarsonAllen; Lisa McCracken, Director, Sr. Living Research, Ziegler

The skilled nursing environment is arguably the most pressured service line today. Shifts in the post-acute space have been underway for some time, but were accelerated and deepened during the pandemic. Many providers are re-examining their commitment to the skilled nursing offerings and working hard to develop strategies to counter current pressures. This session will highlight some of these strategies and provide peer examples of how to navigate this environment.

2:00 - 2:15 p.m. Break

2:15 - 3:15 p.m. Pivoting Towards Community-Based Solutions

Ann Conn, CEO, McGregor Foundation; Anthony Evans, President, Purehealth; Lynne Giacobbe, CEO, Kendal at Home

As senior living looks to revenue diversification, home-and-community-based services are a clear opportunity. Learn how three organizations have created community-based service lines to expand their mission, with an eye to sustainability.

3:15 - 3:30 p.m. Reflection/Next Steps/Wrap Up

REGISTRATION

Conference Registration Fees	
Member	\$150
Non-Member	\$300
Fee includes all workshop materials, light continental breakfast, lunch, and continuing education hours.	

Total Payment Enclosed: \$ _____

Name (Last, First)	
Organization	
Professional Licensure/Credentials	
Title	
Address	
City	
State	Zip
Phone/Cell Phone (circle one)	
E-mail (required for receipt of confirmation)	
Emergency Contact Name	
Phone	
Please indicate any special needs, ADA requirements, dietary needs or food allergies.	

Your registration will be complete upon receipt of this form and payment. All registrants will receive an email confirmation. If you do not receive a confirmation, please contact Corey Markham at (614) 545-9015 or cmarkham@leadingageohio.org.

Substitution and Cancellation Policy: Substitutions, in writing, are welcome at no additional cost. Cancellations received by two calendar weeks prior to event date will be fully refunded. Cancellations received between 7 and 13 days prior to the event date will be refunded minus a \$40 processing fee. No refunds will be issued 6 or fewer days prior to the event date.

PROGRAM INFORMATION

Lodging Options

Ask for the "Quest Conference Center Discount" when reserving your room at any of these nearby hotels.	Fairfield Inn & Suites Polaris 9000 Worthington Road Westerville, OH 43082 (614) 568-0770
Four Points Polaris 8505 Pulsar Place Columbus, OH 43240 (614) 844-5888	Hampton Inn & Suites Polaris 8411 Pulsar Place Columbus, OH 43240 (614) 885-8400



Online registration is required when paying by credit card. Visit www.LeadinAgeOhio.org



Click on Education and Events; select date and event, click link to register.



Mail registration and payment to:
LeadingAge Ohio
2233 North Bank Drive
Columbus, OH 43220

To pay by check or money order, please make payable to:
LeadingAge Ohio

Continuing Education

5.25 clock hours will be awarded upon successful completion.

6.3 CPE hours will be awarded upon successful completion.

Criteria for successful completion: Attendance at entire event.

LeadingAge Ohio is an approved provider by the Board of Executives of Long Term Services and Supports. Core of knowledge subject area(s): Operations; Leadership and Strategy

As stated in the Ohio Administrative Code Rule 4723-14-05, education that has been approved by a board or an agency that regulates a health care profession in Ohio or another jurisdiction is an acceptable option to meet nursing continuing education requirements.

LeadingAge Ohio is an approved CPE Sponsor from the Accountancy Board of Ohio, CPE.379, expiration date: 5.31.2023.