The 12th Annual HJ Sims Late Winter Conference on Financing Methods & Operating Strategies for the Senior Living Industry

Omni La Costa Resort
Carlsbad, CA
February 24-26, 2015

Join us in the sun.
Bask in the knowledge.
About the Sims 2015 Conference

This year's conference will highlight how senior living organizations succeed in today’s competitive environment.

We’ve prepared a comprehensive agenda which will address financing methods and operating strategies designed to meet the challenges that exist in both the not-for-profit and for-profit sectors of the senior living industry. A roster of outstanding speakers will participate in the educational sessions. Breakout sessions, panels and roundtables will provide a forum for exchanging ideas and information. Our Conference format will also provide invaluable networking opportunities.

The objective of the Sims Late Winter Conference is for industry participants to learn and discuss each other’s strategies and solutions for success.

We’re pleased to offer both CEU and CPE credits for the educational sessions.

Omni La Costa Resort

Our 2015 Conference will take place at the Omni La Costa Resort in Carlsbad, CA. This legendary resort is nestled in the rolling coastal foothills of northern San Diego. Its classic yet casual atmosphere and impeccable service creates an unmatched experience for golfers as well as non-golfers. Twelve tennis courts offer play on both clay and hard surfaces, and the resort also boasts a state-of-the-art fitness center and eight heated pools. Of course, there’s also the luxurious La Costa Spa. The Resort is just 30 miles from San Diego International Airport (SAN). For more information, visit the Omni La Costa Resort’s website at lacosta.com.

Special Guest Speakers

DILIP V. JESTE, MD is a Geriatric Neuropsychiatrist who specializes in successful aging as well as psychotic disorders in older adults. He is Senior Associate Dean for Healthy Aging, Estelle and Edgar Levi Chair in Aging, Director of Sam and Rose Stein Institute for Research on Aging, and Distinguished Professor of Psychiatry and Neurosciences at the University of California, San Diego. He is Past President of the American Psychiatric Association and is Principal Investigator on several research and training grants from federal and non-federal sources. He has published 11 books and over 600 articles in peer-reviewed journals and has been in the ISI list of the “world’s most cited authors”– comprising less than 0.5% of all publishing researchers of the last two decades.

VICTOR TABBUSH, PhD is Professor Emeritus at UCLA Anderson School of Management. He specializes in healthcare economics, healthcare leadership and management capacity building. He is the program director and founder of the UCLA Management Development Institute that builds management and leadership capacity of health systems in sub-Saharan Africa and of the Johnson & Johnson Health Care Executive program that serves U.S. community clinics. He has won Outstanding Teaching Awards in all three of UCLA’s MBA programs – full-time MBA, executive MBA and fully employed MBA.

Recreation & Special Activities

World-Class Golf
Tuesday, February 24, 11:00 a.m.
Golf enthusiasts will have the opportunity to participate in a tournament on the Omni La Costa’s recently redesigned, world-class Champions Course. You’re invited to follow in the footsteps of legends at this historic home of 37 PGA events rebuilt for the modern player.

Fishing Excursion & Boating
Tuesday, February 24, Time TBA
For those who will not be playing in the golf tournament, we are planning some exciting boating and fishing activities. Details will be forthcoming.

Opening Night Reception & Dinner
Tuesday, February 24, 7:00 p.m.
Omni La Costa Resort

Special Evening Event
Wednesday, February 25, 7:00 pm
Reception and Dinner at the Museum of Contemporary Art San Diego at La Jolla. The collection at the Museum of Contemporary Art San Diego is comprised of works created after 1950, representing a variety of media and genres: painting, sculpture, works on paper, photography, video, and installation. The Museum is known for collecting works by promising emerging artists and under-recognized, mid-career artists, as well as by major figures in international contemporary art. Dinner guests will have the opportunity to view the amazing galleries. We will be providing motor coach transportation to and from the Omni La Costa Resort and the Museum.

CFO Breakfast
Wednesday, February 25, 7:30 a.m.
Both Non-Profit and Proprietary CFOs are invited to meet each other and discuss important issues.

Tour of Silverado Encinitas Community
Thursday, February 26, 1:00 pm
We are very grateful to Silverado for opening up its memory care community in Encinitas for a tour. Tour space will be extremely limited. Motor coach transportation will be provided to the Community and back to the Omni La Costa Resort.
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Tuesday, Feb. 24
11:00 a.m.  Golf Tournament – Champions Course at the Omni La Costa
(Shotgun Start 11:00 a.m. Please check in by 10:30 a.m.)
Fishing and Boating are planned for those not playing golf.
More details will be available shortly.

4:30 p.m.  Networking – Omni La Costa Resort
The Diversions Lounge is a perfect place to catch up with
colleagues and meet new people.

7:00 p.m.  Opening Night Reception & Dinner – Omni La Costa Resort

Wednesday, Feb. 25
7:30 - 8:30 a.m.  CFO Networking Breakfast – Both non-Profit and Proprietary
CFOs are invited to discuss important issues. Each table will
be hosted and will combine CFOs from both industry segments.

7:30 - 8:30 a.m.  Breakfast & Networking

8:40 - 8:50 a.m.  Welcome & Introduction

8:50 - 10:00 a.m.  General Session
The Senior Living Industry & Capital Markets
Today & Tomorrow.
An expert panel will discuss the most efficient and affordable ways
to finance development and acquisitions today and in the near
future, including a review of Sims’ most creative financings.

10:00 - 10:30 a.m.  Networking Break

10:30 - 11:45 a.m.  Breakout Sessions
I. Broadening Senior Living Communities’ Appeal
by Forging Strategic Partnerships.
As the senior living industry becomes more competitive, leading
communities are looking beyond their buildings to forge deeper
relationships with seniors and organizations in their service areas.
Executives from the non-profit and proprietary segments of the
industry will discuss their successes.

II. Valuing Communities for Loans, Acquisitions and Sales.
How are communities being valued for various purposes? What
methods and/or rules are being used on entrance fee communities,
nursing homes, rental independent, assisted living and memory
support? As new projects are developed and other communities
are purchased or sold, knowing how to calculate a range of
valuations becomes more critical.

11:45 a.m. - 1:15 p.m.  Lunch & Networking

1:15 - 2:30 p.m.  General Session
GUEST SPEAKER: DILIP V. JESTE, MD, Professor and Senior Associate
Dean for Healthy Aging at the University of California, San Diego. Dr.
Jeste is the director of the newly established Center for Healthy Aging
at UC San Diego. Areas of focus for the Center includes healthcare,
technology, housing and community engagement for seniors.
Dr. Jeste will speak about his research on positive aging. His talk will
include recent advances in the field of successful aging, including
research demonstrating ways to keep the brain and mind active, as well
as suggested strategies for preventing dementia.

2:30 - 3:00 p.m.  Networking Break

3:00 - 4:00 p.m.  Breakout Sessions
I. What To Do When Things Are Not Going So Well.
Many communities have gone through difficulties caused by our most recent
recession. Some organizations overcame those difficulties; others did not.
Learn about strategies which were successfully implemented to turn around a
variety of communities.

II. Integrating Innovative Financing Strategies for Future Flexibility.
As senior living financings become increasingly accepted by lenders and
investors, new creative financing methods are being utilized. A
comprehensive list of strategies will be presented, along with ways of
integrating them to create innovative financings for future flexibility.

4:15 - 5:30 p.m.  General Session
GUEST SPEAKER: VICTOR TABBUSH, PHD, Professor Emeritus
UCLA Anderson School of Management. He is the director and
founder of the UCLA Management Development Institute.
Dr. Tabbush will speak about healthcare economics, cost
effectiveness and benefit measurements, including how to best
accomplish successful relationships with hospitals.

7:00 - 10:00 p.m.  Special Evening Event
Reception and Dinner at Museum of Contemporary Art at La Jolla. Guests will
have the opportunity to view the galleries. Transportation will be provided.
Lunch & Networking

General Session

GUEST SPEAKER: DILIP V. JESTE, MD, Professor and Senior Associate Dean for Healthy Aging at the University of California, San Diego. Dr. Jeste is the director of the newly established Center for Healthy Aging at UC San Diego. Areas of focus for the Center include healthcare, technology, housing and community engagement for seniors.

Dr. Jeste will speak about his research on positive aging. His talk will include recent advances in the field of successful aging, including research demonstrating ways to keep the brain and mind active, as well as suggested strategies for preventing dementia.

Networking Break

Breakout Sessions

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Special Evening Event

Reception and Dinner at the Museum of Contemporary Art San Diego at La Jolla. Guests will have the opportunity to view the galleries. Transportation will be provided.
Breakfast & Networking

8:30 - 10:00 a.m.  General Session

Let’s Hear From the Leaders: Setting Themselves Apart.
Both the non-profit and proprietary segments of the senior living industry have extraordinary leaders. Five of them will discuss their organizations’ leadership in various aspects of our industry.

Networking Break

General Session

10:00 - 10:30 a.m.

Maximizing Value and Efficiency in our Communities

As competition in our industry heats up, successful communities will maximize their value to seniors through imaginative innovations – both large and small. Experts in technology, design, marketing, building and operations will share their latest developments.

Lunch & Conclusion of Conference Sessions

12:00 p.m.

Boxed Lunches will be provided outside the meeting rooms.

1:00 p.m.

Tour of Silverado Encinitas Community

Motor coach transportation will be provided to the Community and back to the Omni La Costa Resort.

Silverado is a pioneer in very high-quality memory care and has memory care communities in eight states in addition to offering at home and hospice care in many locations. With its warm, lively interiors and lush, well-manicured grounds, Silverado Encinitas offers a memory care atmosphere that is second to none. Whether engaged in stimulating activities indoors or enjoying the ocean breeze in one of the community’s gazebos, residents experience a lively atmosphere that allows them to remain social and keep enjoying the things that were important to them before their diagnosis.

For more information on the Silverado Encinitas Memory Care Community, click here.

To learn more about the entire Silverado family of communities, click here.

Register for the Sims 2015 Conference

Please call or email Anita Clavin at 203.418.9005 or aclavin@hjsims.com with any questions or requests for additional information. Register online at hjsims.com/register or mail or fax your registration form to Anita Clavin (Fax: 203.256.2377). Please mail the check for your registration fee (no credit cards, please) to: Anita Clavin, HJ Sims, 2150 Post Road, Fairfield, CT 06824-5689.

Hotel Reservations:

We have reserved a limited block of rooms at the special conference rate of $239 per night at Omni La Costa Resort, 2100 Costa Del Mar Road, Carlsbad, CA 92009. For reservations, call 800.854.5000. This rate will be available until February 1, 2015. You may make your reservations directly with the hotel after you have registered for the seminar and will need to inform the hotel that you are registered to attend the Sims Conference. To make your hotel reservation online, please click here.

REGISTRATION FORM

First__________________________________Last__________________________________________

Badge Name__________________________________________________________________________

Title__________________________________________________________________________________

Company______________________________________________________________________________

Address:______________________________________________________________________________

Phone:_______________________________Email_______________________________________________

Activities:

Participate in the Golf Tournament on Tuesday 2/24?  □ Yes □ No

Rather than the Golf Tournament, I prefer a Fishing or Boating Excursion. (Please circle one.)

Participate in the Senior Living Community Tour? □ Yes □ No

Kindly register by January 25, 2015 | Conference attire: Business Casual
Thursday, Feb. 26

7:30 - 8:30 a.m.  Breakfast & Networking

8:30 - 10:00 a.m.  General Session
Let’s Hear From the Leaders: Setting Themselves Apart.
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10:00 - 10:30 a.m.  Networking Break

10:30 a.m. - 12:00 p.m.  General Session
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Registration Fee:
Facility Management, Board Member or Owner: $295. Others: $795. There will be an additional $75 fee for participation in the Golf Tournament, Fishing Excursion or Boating.

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Participate in the Senior Living Community Tour?  □ Yes  □ No

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