

The 5th Annual
**Senior Living
Executive Course**

Join renowned business leaders and USC faculty and learn new strategies for addressing issues with senior living facilities including:

- **Crisis Communication**
- **Economy and Industry Instability**
- **Financial Management**
- **New Research**
- **Medicare/Medicaid Regulation**
- **Legal Issues (Mock Depositions)**
- **Effective Leadership**
- **Industry Trends**

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gero.usc.edu/slec



Presented by

USC Marshall
School of Business

USC Leonard Davis
School of Gerontology

Welcome Reception: Thursday, February 21, 2019

Program:

Friday, February 22 – Saturday, February 23, 2019

Regular Fee – \$2000

USC Leonard Davis School Alumni – \$1500

Tuition discount for Argentum/CALA/ASHA/LeadingAge members

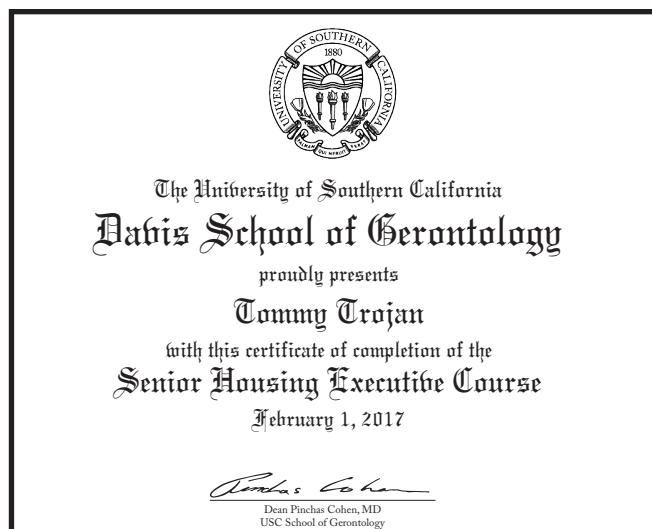
The Senior Living Executive Course blends the science and business of aging into an extraordinary learning opportunity at the world's premiere institution for aging knowledge.

Course participants will:

- Learn from and network with CEOs, CFOs, coos, executive directors, development officers, and other leaders in aging services
- Explore the latest in strategy and science from the field's top trendsetters, decision makers and experts
- Earn CEUs (CA-RCFE/NHA) and a Certificate of Completion from USC

This course will be translated from English to Chinese simultaneously during the program for those who wish to use a headset to listen.

Attendees receive a certificate from USC upon completion of the course.



Schedule of Presentations

Thursday, February 21 - Saturday, February 23, 2019
USC Leonard Davis School of Gerontology

Thursday, February 21, 2019

5:30pm – 7:30pm
Welcome Reception

Friday, February 22, 2019

8:15am – 9:00am
Registration and Breakfast

9:00am – 9:10am
Welcome

Pinchas Cohen, MD

Dean, USC Leonard Davis School of Gerontology; Executive Director, Ethel Percy Andrus Gerontology Center; William and Sylvia Kugel Dean's Chair in Gerontology

James Ellis, MBA

Dean, USC Marshall School of Business; Robert R. Dockson Dean's Chair in Business Administration, and Professor of Clinical Marketing

9:10am – 9:15am
Keynote Introduction

Victor Regnier, FAIA

Associate Dean of Research, ACSA Distinguished Professor, Professor, USC School of Architecture and Leonard Davis School of Gerontology

9:15am – 10:05am
Keynote Address

Paul J. Klaassen

Co-Founder, Sunrise Senior Living, LLC

Schedule of Presentations

10:05am – 11:00am
Effective Leadership

Greg Patton, PhD
Professor of Clinical Business Communication, USC Marshall School of Business

11:00am – 11:15am
Break

11:15am – 12:00pm
Crisis Communication

Greg Patton, PhD
Professor of Clinical Business Communication, USC Marshall School of Business

12:00pm – 1:00pm
Lunch

1:00pm – 2:00pm
Crisis Communication Exercise

Greg Patton, PhD
Professor of Clinical Business Communication, USC Marshall School of Business

2:00pm – 3:00pm
Risk Management – Elder Abuse Lawyers

3:00pm – 3:15pm
Break

3:15pm – 5:00pm
Mock Depositions – Break Out Rooms

5:00pm – 6:00pm
Cocktail Reception

6:00pm
Dinner

Saturday, February 23, 2019

8:15am – 9:00am

Breakfast

9:00am – 10:00am

Keynote Address: New Models for Senior Living

Bill Thomas, MD

Founder, The Eden Alternative and The Green House Project

10:00am – 11:00am

Financing Senior Living

Rick Matros

Chairman of Board, President and CEO, Sabra Health Care REIT

Mercedes Kerr, MRED

Executive Vice President – Business & Relationship Management, Welltower

Robert G. Kramer, MBA

Founder and Strategic Advisor, National Investment Center for Seniors Housing & Care (NIC)

11:00am – 11:15am

Break

11:15am – 12:15pm

Panel – Dementia: Diagnosis, Complications and Care

Chair:

Bill Pettit, MBA

President, Merrill Gardens Senior Living

Panelists:

Loren Shook

Founder, President, Chairman and CEO, Silverado

Schedule of Presentations

Ed Schneider, MD

Dean Emeritus &

Professor of Gerontology, Medicine & Biology, USC Leonard Davis School of Gerontology

12:15pm – 1:15pm

Lunch

1:15pm – 2:00pm

Healthy Aging

Ed Schneider, MD

Dean Emeritus &

Professor of Gerontology, Medicine & Biology, USC Leonard Davis School of Gerontology

2:00pm – 2:45pm

Personalized Aging

Pinchas Cohen, MD

Dean, USC Leonard Davis School of Gerontology; Executive Director, Ethel Percy Andrus Gerontology Center; William and Sylvia Kugel Dean's Chair in Gerontology

2:45pm – 3:15pm

USC Panel – Gerontology in Senior Living

Chair:

John Erickson

Founder, Chairman and CEO Erickson Retirement Communities

Panelists:

Pinchas Cohen, MD

Dean, USC Leonard Davis School of Gerontology; Executive Director, Ethel Percy Andrus Gerontology Center; William and Sylvia Kugel Dean's Chair in Gerontology

Ed Schneider, MD

Dean Emeritus &

Professor of Gerontology, Medicine & Biology, USC Leonard Davis School of Gerontology

3:15pm – 4:15pm

Building a New Community

Patricia Will

Co-Founder, President and CEO, Belmont Village Senior Village

Molly Forrest

CEO and President, Los Angeles Jewish Home

4:15pm – 5:15pm

Panel – Vision for the Future

Chair:

Jack Callison

CEO, Enlivant

Panelists:

Tom Grape

Founder, Chairman, President and CEO, Benchmark Senior Living

Molly Forrest

CEO and President, Los Angeles Jewish Home

5:15PM

Closing and Certificate Ceremony

Pinchas Cohen, MD

Dean, USC Leonard Davis School of Gerontology; Executive Director, Ethel Percy Andrus Gerontology Center William; and Sylvia Kugel Dean's Chair in Gerontology

Ed Schneider, MD

Dean Emeritus &

Professor of Gerontology, Medicine & Biology, USC Leonard Davis School of Gerontology

Maria Henke, MA

Senior Associate Dean, USC Leonard Davis School of Gerontology

Sophie Davis Art Gallery Current Exhibition Recognition Reception

J Michael Walker

Los Angeles Artist



Pinchas Cohen, MD

Pinchas Cohen is the Dean of the University of Southern California Leonard Davis School of Gerontology and Executive Director of the Ethel Percy Andrus Gerontology Center, and holder of the William and Sylvia Kugel Dean's Chair in Gerontology. He has received numerous awards for his research, including a National Institute of Aging "EUREKA" Award and the National Institutes of Health Director Transformative RO1 Grant. He also recently received the Glenn Award for Research in Biological Mechanisms of Aging. Dr. Cohen is president of the Growth Hormone Society and has served on the Endocrine Society Steering Committee. He sits on multiple NIH study sections and on several editorial boards. Dr. Cohen is leading several new initiatives at the USC Leonard Davis School, including the development of a center for digital aging. He also promotes the creation of tools for "personalized aging," an approach he spearheads for the purpose of using the latest technologies, such as genomics, for individualizing healthy aging strategies. Dr. Cohen received his MD from the Technion University in Haifa, Israel. Dr. Cohen previously trained

at Stanford University, held his first teaching position at the University of Pennsylvania and was Professor and Vice Chair for Research at the Mattel Children's Hospital at UCLA, as well as the Co-Director of the UCSD/UCLA Diabetes Research Center.



James Ellis, MBA

James Ellis was appointed Dean of the USC Marshall School of Business in 2007. Previously, he served as the University's Vice Provost for Globalization, Marshall's Vice Dean for External Relations, and Marshall's Associate Dean for the Undergraduate Program. As an instructor, he has been named professor of the year by many organizations and in 2003 received Marshall's Golden Apple Award and Teaching Has No Boundaries Award. Professor Ellis continues to teach Marshall's invitation-only Freshman Leadership Colloquium each fall. Dean Ellis serves on boards at the Capital Group and Mercury Insurance as well as a number of non-profit boards.

Victor Regnier, FAIA

Victor Regnier is a teacher, researcher and architect who has focused his academic and professional life on the design of housing and community settings for older people. He holds a joint professorship between the USC School of Architecture and the Leonard Davis School of Gerontology, which is the only joint appointment of this type in the US. He is the only person to have achieved fellowship status in both the American Institute of Architects and the Gerontological Society of America. From 1992 until 1996, he served as USC's Dean of the School of Architecture. Professor Regnier is currently the Associate Dean for Research in the School of Architecture. He has published 10 books/monographs as well as 60 articles and book chapters dealing with various aspects of housing and community planning for the elderly. As a designer/practicing architect, he has provided consultation advice during the last 40 years on over 400 building projects in 38 states, Canada, Germany and England.



Paul J. Klaassen

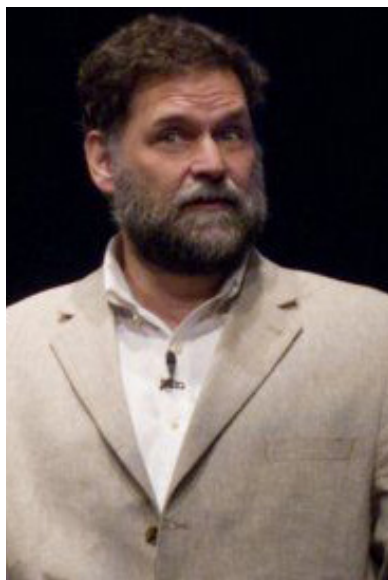
Paul is the founder and chairman of the board for Sunrise Senior Living. He founded Sunrise with his wife, Terry, in 1981 and served as CEO until November 2008. Paul currently serves on the board of directors of The Netherland-American Foundation, the National Investment Center for the senior housing and care industry and the U.S. Chamber of Commerce bringing over 25 years of experience as a founder and leader of a public operated assisted living and senior housing facility. Moreover, he serves on the board of trustees of The Trinity Forum, a leadership academy, and the Advisory Committee for the Department of Health Care Policy at Harvard University Medical School. Paul was also the founding chairman of ALFA, the Assisted Living



Greg Patton, PhD

Greg Patton is a professor of Clinical Business Communication at the USC Marshall School of Business. He is an expert in communication, and interpersonal and leadership effectiveness. He has received numerous teaching awards, been ranked as one of the top three professors at USC, and helped USC's Executive MBA Program achieve a #1 worldwide ranking by the Wall Street Journal for Leadership and Management skills instruction. Dr. Patton has extensive international experience, trained thousands of leaders worldwide, and has advised on several hundred consulting engagements throughout the Pacific Rim. He has held more than twenty leadership positions in national and international organizations and conducts applied research in behavioral skill development.





Bill Thomas, MD

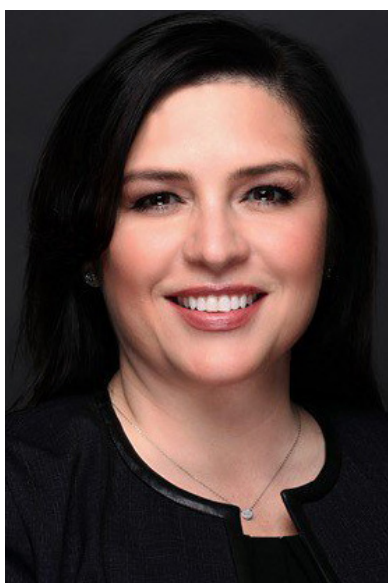
Bill Thomas is an author, entrepreneur, musician, teacher, farmer and physician whose wide-ranging work explores the terrain of human aging. Best known for his health care system innovations, he is the founder of a global non-profit (The Eden Alternative) which works to improve the care provided to older people. He is the creator of The Green House, which Provider Magazine has called the “pinnacle of culture change.” Dr. Thomas also developed the Senior ER model of care and is now working to transform the acute care services provided to elders.

His synthesis of imagination and action led the Wall Street Journal to highlight him as one of the nation’s “top 10 innovators” changing the future of retirement in America and US News and World Report to name him as one of “America’s best leaders.”



Rick Matros

Rick Matros is the chairman and CEO of REIT Special Forces for Sabra Health Care REIT, based in Irvine, California. Sabra is a publicly held real estate investment trust that has more than 500 skilled nursing, senior housing, hospitals and other health care assets across its portfolio. The company recently completed a deal to acquire Care Capital Properties, expanding its skilled nursing portfolio and presence across the U.S. and making it a more than \$7 billion company. The company has grown under Matros’s leadership, which spans a wealth of experience in senior housing and care, including work with post-acute providers Care Enterprises, Regency Health Services and CareMeridian, a company specializing in traumatic brain injuries.



Mercedes Kerr, MRED

Mercedes Kerr is Executive Vice President of Welltower Inc. and leads the company’s domestic and international deal origination, relationship management, outpatient medical portfolio management and asset management. She is responsible for identifying, building and managing relationships with health systems, seniors housing operators, real estate developers and financial institutions to grow the company’s health care real estate portfolio. As a well-recognized health care real estate professional, she has established strong and enduring partnerships across the industry and is working to advance the company’s strategy to promote innovative care delivery models designed to improve wellness. In addition to her leadership of Welltower’s business development team, Ms. Kerr also directs many of Welltower’s strategic business relationships.

Robert G. Kramer, MBA

Robert Kramer is founder and strategic advisor to the National Investment Center for Seniors Housing & Care (NIC), a non-profit education and resource center that serves debt and equity investors interested in the senior housing and care industry. NIC is the leading provider of research, business and financial performance data on this sector for capital providers. NIC's focus is to enable access and choice in senior housing and care by providing data, analytics and connections that bring together investors and care providers. Mr. Kramer, a frequent writer and speaker on trends in senior housing and long-term care, directed NIC from its inception in 1991 until July 2017. As former county government official and Maryland state legislator, he was a leader on health and environmental issues while representing the state capital of Annapolis in the 1980s. Mr. Kramer was educated at Harvard and Oxford Universities while also holding a Master of Divinity degree from Westminster Theological Seminary.



Bill Pettit, MBA

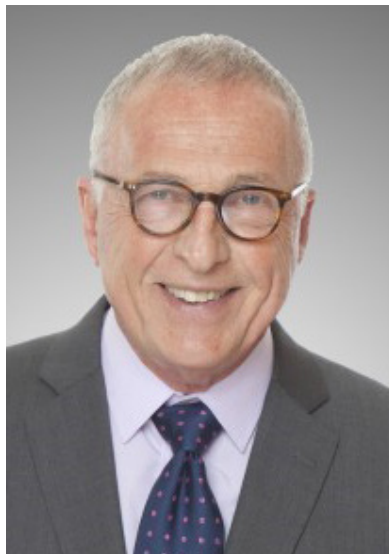
Bill Pettit is the president and COO of Seattle-based R.D. Merrill Company, the parent company of Merrill Gardens. Family-owned and operated for four generations, Merrill Gardens started with a single community and brought Pettit on board from the banking industry to focus on growing and operating the business. It is now one of the most respected senior living providers in the country because of their innovative programs and determined commitment to both residents and team members. They currently have 33 communities, with 8 new communities in development, in 8 states offering memory care, independent and assisted living.



Loren Shook

Loren Shook is founder, president, chairman and CEO of Silverado. He is often recognized as a memory care futurist. Mr. Shook is a true visionary – helping to transform an industry while creating thousands of healthcare jobs – but he is most driven by a lifelong commitment to changing lives. He assures that Silverado has the organizational structure and culture that empowers all leaders to lead, and enables frontline associates to care for the loved ones of the families they serve. His role is to ideate and lead strategic planning, identify new opportunities, partner with key public policy influencers and further the industry – making it possible for Silverado to achieve its mission and vision to change the world. As a leader in senior housing, he frequently speaks at national and international events, and has presented to the Senate Special Committee on Aging – bringing insight on how to provide quality of life for people with Alzheimer's disease. He co-authored *New Possibilities in Memory Care: The Silverado Story* and *The Silverado Story: A Memory Care Culture Where Love is Greater than Fear*.





Ed Schneider, MD

Edward Schneider is a Professor of Gerontology at the USC Leonard Davis School of Gerontology and a Professor of Medicine at the USC Keck School of Medicine, with a joint appointment in Biological Sciences and Molecular Biology. Before coming to USC in 1986, Dr. Schneider was the Deputy Director of the National Institute on Aging and the Chief of the Laboratory of Molecular Genetics, Gerontology Research Center, National Institute on Aging. His research interests include polypharmacy, geriatrics and health care costs of an aging population. He was the first recipient of the William and Sylvia Kugel Chair of Gerontology. He is the chairperson of the Los Angeles Elder Abuse Forensic Center Advisory Committee and is involved in elder abuse litigation. Dr. Schneider is engaged in several clinical studies at the Los Angeles Jewish Home for the Aging. In his initial study, he demonstrated that it was possible to wean patients off anti-hypertensive medications to reduce their risk of falls and other side effects. He is currently looking at ways to reduce drug usage by older Americans because the more medications a

person takes the greater risk of drug-drug interactions or adverse drug reactions.



John Erickson

John C. Erickson, CEO and Chairman of Erickson Retirement Communities, a privately held company based in Baltimore and founded in 1983, created RLTV (Retirement Living TV) with the goal of establishing a dominant one-stop portal for boomers and seniors. Mr. Erickson has been involved in the senior care industry since the early 1970s, acquiring and developing moderate-income retirement housing in Florida and Arizona. In 1983, he began concentrating on providing full-service continuing care retirement housing in the northeastern United States with the flagship community of Charlestown, near Baltimore. Erickson Retirement Communities, now known as Erickson Living, is the largest developer and operator of campus-style, continuing care retirement communities in the United States. The company currently employs nearly 12,000 individuals, who serve more than 22,000 residents in ten states.



Patricia Will

Patricia Will is the co-founder and CEO of Houston, Texas-based Belmont Village Senior Living. Prior to co-founding Belmont Village, she had a background in real estate specifically as a developer for medical properties. Working with her partners, she learned about dementia and all of the conditions that accompany aging. Together they wanted to create a place that would foster a sense of independence in each of their residents. They developed and expanded their relationships in the medical community and schools of hospitality to merge the best of both worlds. She has led the company from its first community opening in 1998 to a thriving senior living community pioneer with 28 operating properties and counting. “We took all that we had learned—all of these great ideas—and built a community around it.”

Molly Forrest

Molly Forest serves as the CEO and President of Los Angeles Jewish Home for the Aging. As a graduate of Oregon State University, she is active in a variety of community organizations including immediate past Chair of the Association of Jewish Aging Services, the California State University Northridge (CSUN) Professional Health Care Administration Committee, the CSUN Alzheimer's Association Center Advisory Committee, the Geriatric Education and Research Organization, and the council of Agency and Federation Executives. She is a recipient of the Jewish Communal Professionals of Southern California Allan J. Kassin Award for Outstanding Professional Achievement and the San Fernando Valley Business Journal Health Care Leadership Award. She is also a frequent guest speaker regarding geriatric issues for various leading healthcare, eldercare, and nonprofit organizations.



Jack Callison

Jack Callison was appointed as Enlivant's new CEO and a Board Director in July 2013, concurrent with TPG's take private acquisition of the organization. Based in Chicago, Enlivant is one of the nation's largest senior living owners and operators with a presence in 27 states across the U.S. As Enlivant's CEO, Mr. Callison is responsible for all aspects of Enlivant's investment, operations, and financial strategy. He has over 20 years of senior housing and multifamily leadership experience in both the private and public sectors. From October 2008 to March 2013, he served as Holiday Retirement's CEO. During this tenure, Holiday Retirement owned and operated approximately 37,000 senior housing units across the United States and Canada and employed over 11,000 employees. Prior to joining Holiday Retirement, Mr. Callison was with Archstone (NYSE: ASN, \$22 billion of assets) for 12 years in a variety of senior leadership positions, including President – U.S. Operations. Archstone owned and operated over 70,000 multifamily apartments in the United States and over 10,000 units in Germany. Mr. Callison's sits on the board of directors for several other groups including the National Investment Center for Senior Housing and Care ("NIC"), Argentum, American Seniors Housing Association ("ASHA") and the Ann & Robert H. Lurie Children's Hospital of Chicago.

