



The Nebraska Chapter of the Healthcare Financial Management Association presents:



The State of the Senior Care Industry: Operations, Reimbursement and Care Coordination

Thursday, January 30 and Friday, January 31, 2020

Embassy Suites Omaha-La Vista Hotel & Conference Center

REGISTER TODAY

Registration Fee - \$275.00

Includes Continental Breakfast on Thursday and Friday and lunch on Thursday.
Each registered guest will receive two drink tickets for the Thursday evening social.

AGENDA

Thursday, January 30

7:00 - 8:00 a.m.

Registration and Continental Breakfast

8:00 - 9:00 a.m.

Senior Housing Trends, Demographics, Rent Rates, Construction, M & A Trends

Lana Peck, Senior Housing Principal

The National Investment Center for Senior Housing & Care

9:00 - 10:00 a.m.

How Changing Our Focus Changed Walker Methodist's future

Scott Riddle, President & CEO

Walker Methodist

10:00 - 11:00 a.m.

Senior Housing Valuations & Non-Recourse Financing

Allison Holland, Managing Director

Charles A. Bissell, CRE, Managing Director

JLL

11:00 - 11:30 a.m.

USDA Senior Housing Financing

Anita Lopez, Asset Risk Coordinator

Community Facilities Program United States Department of Agriculture – National Office

11:30 a.m. - 1:00 p.m.

Lunch

1:00 – 2:00 p.m.

Build, Design, Renovation to Maximize Profitability & Reimbursement

Tom Martin, President Partner and Tom Lemkuil, NCARB, AIA

Community Living Solutions

2:00 – 3:00 p.m.

Post Acute Care Coordination

Dr. Ann Polich, Vice President Quality/Performance Improvements

Methodist Health System

3:00 – 4:30 p.m.

Patient Driven Payment Model: The Financial Impact

Sherri L. Robbins, RN, CLNC®, RAC-CT®, Senior Managing Consultant

BKD CPAs & Advisors

4:30 – 6:30 p.m.

HFMA Social

Friday, January 31

7:00 - 8:00 a.m.

Registration and Continental Breakfast

8:00 – 9:00 a.m.

The Future of Senior Care

Heath Boddy, President & CEO

Nebraska Health Care Association

9:00 – 10:00 a.m.

Nebraska Legislative Update

Andy Kloeckner, Moderator

Heath Boddy, President & CEO - Nebraska Health Care Association; Ron Ross, President - Rural Health Development;

Jenifer Acierno, CEO - Leading Age Nebraska

10:00 a.m. – Noon

Nebraska Medicaid Panel Discussion

Marty Dubas, Moderator

Dr. Matthew Van Patton, Director, Division of Medicaid and Long-Term Care (MLTC)

Dr. Larra Petersen-Lukenda, Deputy Director, Business Performance & Analytics, MLTC

Dr. Carisa Schweitzer Masek, Deputy Director, Population Health, MLTC

Jeremy Brunssen, Deputy Director, Finance & Program Integrity, MLTC

Speaker Bios

Lana Peck

Lana is a senior principal at the National Investment Center for Seniors Housing & Care (NIC). With two decades of experience in the seniors housing industry, Lana has research expertise in pricing analysis, product development, market segmentation, and market feasibility research including demand analyses of blue sky developments, expansions, and repositionings for master planning projects across the nation.

Prior to joining NIC, Lana worked for Brooks Adams Research in Richmond, Virginia, where she was director of research, responsible for designing and executing consumer market research, development site selection and market-level demand studies, and nationwide seniors housing industry research for both for-profit and not-for-profit communities, systems, and national trade organizations.

Lana's prior experience also includes more than a decade with Life Care Services LLC, in Des Moines, Iowa, where she served as senior market research analyst, and Gartner, Inc., a worldwide-leading information technology research and advisory company, where she managed global business-to-business market research projects. She holds a Master of Science in Management in Business Management and a Master of Family and Consumer Sciences in Gerontology.

About The National Investment Center for Seniors Housing & Care

The National Investment Center for Seniors Housing & Care (NIC) is a nonprofit 501(c)(3) organization whose mission is to support access and choice for America's seniors by providing data, analytics, and connections that bring together investors and providers in independent living, assisted living, memory care, skilled nursing and post-acute care. Since 1991, NIC has facilitated informed investment decisions and leadership development in seniors housing and care. Through its industry-leading annual conferences, NIC MAP® Data Service, research, analytics, and sector outreach, NIC serves as an indispensable resource for owners, operators, developers, capital providers, researchers, academics, public policy analysts, and others interested in meeting the housing and care needs of America's seniors. NIC has proudly sponsored the Seniors Housing & Care Journal, a peer-reviewed journal for applied research in the seniors housing and care field, since 1993.

Scott Riddle

Scott Riddle, Chief Executive Officer and President, leads all aspects of Walker Methodist's operations, mission, vision, and strategy. Scott has transformed service delivery within Walker Methodist and expanded the horizon in which they serve older adults. Scott joined the organization as Chief Financial Officer in April 2013 and was named Chief Executive Officer and President four months later.

Prior to joining Walker Methodist, Scott worked as the Vice President of Finance at Ecumen. His professional experience includes Finance roles at International Multifoods and Northwest Airlines and in diverse industries such as consumer auto rental and medical device, among others.

He holds an MBA from the University of St. Thomas and a Bachelor's degree in Business Administration from Bethel University. He serves on the Board of Directors for LeadingAge Minnesota, and Constellation, Inc. He also served on the Board of Governors for the Bethel University Foundation for five years.

Scott is a key partner in advocacy, working to inform and influence the Minneapolis City Council on the proposed wage and workforce requirements. Scott was named one of the Top 100 Influential Healthcare Leaders by Minnesota Physicians Magazine in 2016. This award recognizes people who help make health care in Minnesota a global model of excellence.

He was also named to LeadingAge Minnesota's 50 for the Next 50 in 2017. This distinction recognizes innovative and influential leaders who are charting the course for the next wave of older adult services that will empower Minnesotans to age well and live fully.

Most recently, The Employer Support of the Guard and Reserve, ESGR, presented Scott, with their Patriot Award. The Patriot Award reflects efforts to support citizen service people through a wide range of measures, including flexible schedules, time off prior to and after deployment, care for families, and leaves of absence as needed.

About Walker Methodist

Walker Methodist has a rich history of serving older adults that goes back 74 years - a history that we are very proud of. Our mission is Life. And all the living that goes with it. Enhancing the lives of older adults through a culture of care, respect and service. Our mission is the core of our beliefs and permeates all that we are as an organization. Walker Methodist is a faith-based, not-for-profit organization that specializes in lifestyle, housing and health care services for older adults. We own, operate and manage 15 communities, provide rehabilitation services, and operate leading sub• acute transitional care centers that help people recover from hospitalizations or surgeries so they can return home.

Allison Holland

Allison Holland was a Senior Vice President in the Multifamily Finance division of Capital One prior to joining JLL in September 2016. Prior to Capital One, Ms. Holland was a Senior Vice President for the Healthcare Mortgage Banking Group within KeyBank Real Estate Capital where she managed six healthcare Mortgage Bankers and their origination efforts within the platform. Prior to 2014, Allison was a Vice President / Healthcare Mortgage Banker with responsibility of originating seniors housing project loans for stabilized properties that are ultimately sold to Fannie Mae, Freddie Mac, life insurance companies or are insured by HUD. To date, Ms. Holland has overseen \$3.0 billion in debt transaction related to the seniors housing and healthcare industry and in 2017 closed Fannie Mae's largest seniors housing credit facility transaction to date at a total debt amount of \$975 million. Prior to joining Key, Allison worked for Guaranty Bank for more than five years where she specialized in originating, underwriting, closing and managing short-term loans for medical office buildings, independent living, assisted living, Alzheimer's care and CCRC projects.

Charles A. Bissell, CRE

Mr. Bissell serves as Managing Director in JLL's Seniors Housing Capital Markets Group. He is involved in sourcing capital for seniors housing projects (equity and debt), and in the sale of seniors housing assets. Mr. Bissell also provides a wide variety of advisory services to clients seeking insight into the seniors housing market. Mr. Bissell's experiences includes all types of seniors housing, ranging from age-restricted apartments to entrance-fee CCRCs.

Mr. Bissell has been involved in commercial real estate since 1986. Prior to joining JLL, he held ownership in one of the founding companies of Integra Realty Resources (IRR), which grew into a national valuation and consulting company with more than 60 offices. He started and led IRR's Seniors Housing and Health Care Practice, and served on the national Board of Directors for the firm.

Mr. Bissell also co-founded and co-managed the ARA National Seniors Housing Group. Mr. Bissell led this seniors housing investment sales platform from its founding in 2008 through its growth and eventual disposition in 2014. Over its tenure, the firm was involved in the sale of nearly \$1 billion in seniors housing properties and represented major players in the sector, such as AEW and Brookdale.

About JLL

JLL (NYSE: JLL) is a leading professional services firm that specializes in real estate and investment management. Our vision is to reimagine the world of real estate, creating rewarding opportunities and amazing spaces where people can achieve their ambitions. In doing so, we will build a better tomorrow for our clients, our people and our communities. JLL is a Fortune 500 company with annual revenue of \$16.3 billion, operations in over 80 countries and a global workforce of over 90,000 as of December 31, 2018. JLL is the brand name, and a registered trademark, of Jones Lang LaSalle Incorporated.

Anita Lopez

Anita is a National Office Community Facility Programs Asset Risk Coordinator, for Rural Development, USDA, overseeing 16 states and two territories. Prior to her current position (September, 2018) Anita was the Community Programs Program Director for California for five years. During her tenure as Program Director she approved over \$200 Million in healthcare loans and grants. Anita graduated from UC Davis in 1991 with a degree in Agricultural Economics. She started working with Farmer's Home Administration (now known as Rural Development) as a summer intern and has worked in Illinois, Missouri and finally back home in CA for the last 21 years.

About the USDA

The US Department of Agriculture provides leadership on food, agriculture, natural resources, rural development, nutrition, and related issues based on public policy, the best available science, and effective management. We have a vision to provide economic opportunity through innovation, helping rural America to thrive; to promote agriculture production that better nourishes Americans while also helping feed others throughout the world; and to preserve our nation's natural resources through conservation, restored forests, improved watersheds, and healthy private working lands. Rural Development, an Agency within USDA, helps rural areas to develop and grow by offering Federal assistance that improves quality of life. Rural Development targets communities in need and then empowers them with financial and technical resources. The Community Facilities program is a program area within Rural Development's Rural Housing Service mission area. The Community Facility Program offers both Guaranteed and Direct loans and grants for essential community facilities like schools, healthcare, education, first responders, etc.

Tom Martin, P.E.

Tom is a licensed Structural Engineer with a minor in Economics from the University of Wisconsin Madison and CO-Founder and President of Community Living Solutions, a firm providing professional planning, design and construction services solely to the senior living industry with offices in Des Moines, Iowa and Appleton, Wisconsin. Tom's professional experience spans 30 years in the planning and design-build industry with the past 12 years focused exclusively on improving senior living environments at all levels of the continuum of care. As a founding team member at Community Living Solutions, Tom contributes to a firm that strives to create a better quality of life for older adults and those who care for them through sustainable business solutions that streamline operations, increase marketability and maintain a strong bill of financial health.

Thomas Lemkuil, NCARB, AIA

Thomas is a lead project architect at Community Living Solutions, a firm providing professional planning, design and construction services solely to the senior living industry with offices in Wisconsin and Iowa. Tom's professional experience spans 20 years in the planning and design industry and more specifically, over 15 years exclusively in senior housing design spanning all levels of the continuum of care. He has been with CLS since 2008 and prides himself in designing facilities to meet the needs to staff and residents. Designing spaces that invoke the feeling of home versus an institution. Tom received his Bachelor of Arts in Architectural Studies from the University of Minnesota – Twin Cities and is a licensed architect in Wisconsin, and Iowa.

About Community Living Solutions

Our mission at Community Living Solutions, Creating, Transforming and Sustaining Senior Living Communities, is fulfilled through architecture, planning and construction management services that we have provided for over 100 senior living providers in Iowa and across the Midwest. Our firm was founded 12 years ago and is the realization of a vision for a dynamic, solution oriented, legacy company focusing exclusively on the senior living industry. We have assembled a team of 18 employees occupying two offices in Des Moines, Iowa and Appleton, Wisconsin, offering over 200 years of collective experience for our clients. Our team is committed to combining our specialized experience with the expertise of our clients in order to create focused, responsible and fiscally sustainable results for providers of assisted living, nursing home and retirement communities.

Ann Polich, MD

Ann Polich has served as the vice president for quality, safety, and population health for the Nebraska Methodist Health System since 2016. In this capacity she has had responsibilities for clinical quality, risk management, infection control, regulatory standards, population health, post-acute care, data analytics, lean management, and episode payment models. Before joining Methodist she practiced at the Omaha VA as a hospitalist and served as the Associate Chief of Staff for Patient Safety for 10 years. Prior to this position she had a primary care practice in southwest Kansas. Dr. Polich graduated from the University of Kansas School of Medicine and completed her internal medicine residency training at Creighton University. She subsequently attained a MPH from KU as well as a MBA from Nebraska Methodist College.

About Methodist Health System

A leading regional integrated health care delivery system, Methodist Health System provides quality health care and preventive services to residents throughout the Midwest. Founded in 1982 as the first health care system formed in the region, the Methodist Health System mission is simple: "Improving the health of our communities by the way we care, educate and innovate. With four hospitals, more than 30 clinic locations, a nursing and allied health college, medical supply distributorship and central laundry, Methodist Health System brings the full resources of our regional network of health care providers, educators and support services to Nebraska and Western Iowa. Methodist has a tradition of providing quality health care to the region in cardiovascular surgery, neurosurgery, women's health, cancer care, gastroenterology, orthopedics, and comprehensive diagnostic services.

Sherri L. Robbins, RN, CLNC®, RAC-CT®

A member of BKD National Health Care Group, Sherri has more than 25 years of experience and focuses on long-term care. She provides clinical consulting for health care providers and educates providers about Medicare reimbursement strategies. Sherri has trained numerous skilled nursing facilities as well as swing bed and skilled nursing units about proper minimum data set completion to manage the Medicare program. She performs comprehensive follow-up reviews focused on patient-centered care and regulation compliance to help providers obtain appropriate Medicare reimbursement. Prior to joining BKD, she had 10 years of health care experience as a director of nursing and administrator in a skilled nursing facility and also worked as a licensed practical nurse and certified nurse assistant. Sherri is a member of the Missouri League for Nursing and serves on the league's scholarship and awards committee. She is a Certified Legal Nurse Consultant (CLNC®), licensed nursing home administrator and Resident Assessment Coordinator - Certified (RAC-CT®). As a CLNC, Sherri assists attorneys representing health care providers. She frequently presents to long-term care and senior living associations. Sherri is a 1992 graduate of Mercy College of Nursing and Health Sciences of Southwest Baptist University, Springfield, Missouri, with a registered nurse (RN) certification, and a 1998 graduate of Southwest Baptist University, Bolivar, Missouri, with a B.S. degree in nursing.

About BKD

BKD is a national CPA and advisory firm that can help you reach your goals. We have 40 offices in 18 states, with trusted advisors who offer solutions for clients across the country and beyond. Our expertise goes well beyond the standard accounting services to include risk management, technology, wealth management and forensic and valuation services. Our clients represent a wide range of industries, and we're even part of an alliance of firms that gives us a global reach. For our health care clients we help with improving performance, compliance, and focus on patient care. You have big plans for your organization, but amid a rapidly shifting payment system, increased regulatory complexity and operational challenges, the path can be less than clear. BKD advisors can leverage specialized nationwide expertise to help you make sound decisions for your organization.

Heath G. Boddy, BS, LNHAAs President and CEO of the Nebraska Health Care Association

Mr. Boddy leads the state's nursing facility, assisted living, hospice, home health, and licensed practical nurse associations, as well as the Nebraska Health Care Foundation and an accredited post-secondary college dedicated to long-term care. Prior to serving as NHCA's President and CEO, Mr. Boddy served as executive director and administrator in several Nebraska long-term care facilities. He currently serves on the National Center for Assisted Living Board of Directors, Affiliated State Health Care Association Executives Board of Directors, University of Nebraska-Department of Gerontology Advisory Board, and Great Plains Quality Improvement Network Board of Directors. Mr. Boddy received an Associate of Applied Science degree in Nursing Home Administration from Southeast Community College and a Bachelor of Science in Healthcare Management degree from Bellevue University.

About NHCA

Nebraska Health Care Association is a family of organizations focused on the education, advocacy, and overall support needs of Nebraska health care providers. Entities under the NHCA umbrella include Nebraska Nursing Facility Association, Nebraska Assisted Living Association, Nebraska Hospice and Palliative Care Association, Nebraska Association of Home Health Agencies, Licensed Practical Nurse Association of Nebraska, Nebraska Health Care Learning Center (an accredited post-secondary college dedicated to long-term care), and Nebraska Health Care Foundation.

Ron Ross

Ron Ross and Roger Petrik started Rural Health Development, Inc. in 1990. As President of Rural Health Development, Inc., Ron provides leadership for the staff and the facilities they manage.

Ron served the State of Nebraska when Governor Mike Johanns appointed him to his Cabinet in 1999. His entrepreneur spirit helped him lead the Department of Health and Human Services (Nebraska) for five years at a time when the national economy forced State Government to improve programs with fewer resources. When the Nebraska State Treasurer resigned, the Governor asked Ron if he would fill out the remaining three years of the term. There were many candidates for this position but the Governor had confidence in Ron's integrity and work ethic. Since returning to RHD in 2007, Ron continues to help grow the company. With expansion into Kansas and Wyoming, and with our facilities in Iowa and Nebraska, RHD is starting to have a significant presence in the Midwest.

Jenifer Acierno

Jenifer is President & CEO of LeadingAge Nebraska. LeadingAge Nebraska is an association that provides education, advocacy, and technical assistance to non-profit providers of services to seniors, including nursing facility, assisted living, independent living, adult day services, and affordable housing. LeadingAge Nebraska is one of 38 state level affiliates of the national LeadingAge organization.

Prior to her work for LeadingAge Nebraska, Jenifer worked as a Deputy Director with the Nebraska Department of Health and Human Services, Division of Public Health, overseeing the areas of Health Licensing and Health Data, which included overseeing the areas of Epidemiology, Statistics, Vital Records, Professional and Facility Licensure (including Survey & Certification), Licensure Investigations and Emergency Preparedness and Response. She served as the Deputy Director of Public Health responsible for the Community Health Planning and Protection Unit; Deputy Director of the Division of Medicaid and Long-Term Care; Supervising Attorney for Medicaid, Human Resources, Contracts and Vital Records; Staff Attorney with DHHS serving primarily the Medicaid and Long-Term Care area; DHHS Hearing Officer; and started her career at Nebraska Legal Services representing clients in civil litigation.

Jenifer worked as the HIT lead for DHHS's public health initiatives and was the IT Initiatives lead in her previous work with Medicaid and Long-Term Care. She has served as a member of the Nebraska eHealth Council, the Association of State and Territorial Health Officials (ASTHO) Senior Deputy Committee, ASTHO eHealth/ Informatics Committee, the NeHII Provider Association Advisory Council, and the GPQIN Nebraska Stakeholder Advisory Board.

Jenifer is a graduate of Nebraska Wesleyan University with a B.A. in Political Science and a B.A. in Global Studies. She graduated with her J.D. from the University of Nebraska College of Law. Jenifer has served on a number of boards and commissions in professional and personal capacities and has a personal commitment to civic work.

Matthew Van Patton, DHA, was appointed in February 2018 by Governor Pete Ricketts to serve as the Director of the Division of Medicaid and Long-Term Care within the Nebraska Department of Health and Human Services. In this capacity, he oversees the division responsible for Nebraska's Medicaid managed care program, Heritage Health, and the Children's Health Insurance Program, which collectively cover more than 240,000 of Nebraska's most vulnerable citizens. He is responsible for an annual budget exceeding \$2.2 billion and managing a division with nearly 600 employees. Van Patton's 18-year career has focused on healthcare and public policy. Immediately before his appointment, he served as the president and chief executive officer of Cadre Medical Technologies, LLC, a startup healthcare technology company building transition of care and staff placement solutions. Previously, Van Patton served as the Chief of Staff for Congressman Trey Gowdy of South Carolina. He has also worked as Chief of Staff to the Board of Directors, Chief Policy Officer, Director of Innovations and Institutional Review Board Administrator for the Spartanburg Regional Healthcare System. Van Patton holds a Doctor of Health Administration degree from the Medical University of South Carolina. Additionally, he also holds a Master of Arts in Strategic Communications and Leadership from Seton Hall University and a Bachelor of Arts in Communications from the University of South Carolina Upstate. He is a native of Greer, South Carolina. Van Patton is a Liberty Fellow and a member of the Aspen Global Leadership Network.

Jeremy Brunssen is the Deputy Director of Finance and Program Integrity for the Division of Medicaid and Long-Term Care in the Nebraska Department of Health and Human Services. He began this role in February 2018. Prior to that he was the Financial and Business Operations Administrator for Medicaid and Long-Term Care from October 2016-January 2018. Before joining the State of Nebraska team he served in several leadership roles, to include Director of Financial Aid, Campus President and Director of Ground Operations for the Midwest Region, at Kaplan University for 13 years. Jeremy earned his Bachelor's Degree in Political Science at Iowa State University in May 2003 and his Master's Degree in Business Administration at Kaplan University in June 2007. Through his education and experience with Kaplan and the State of Nebraska, Jeremy has extensive experience creating and managing large budgets, leading large and complex organizations and business units, and has demonstrated a strong skillset to use data and market knowledge to implement and reform programs and policies to benefit the populations his institutions provide services to.

Carisa Schweitzer Masek, PharmD, MBA, MPH, is the Deputy Director for Population Health for the Division of Medicaid and Long-Term care in the Nebraska Department of Health and Human Services. She began her role in July 2019. She oversees the efforts focused on relationship-based person-centered care intended to improve health outcomes and promote wellness in patients and populations. She has previous experience assisting organizations apply evidence-based guidelines, multi-disciplinary care practices, and best practice standards to achieve high quality and cost-effective health outcomes. Prior roles include Executive Director for Enterprise Applications and Director of Pharmacy for The Nebraska Medical Center, an interaffiliate and interdisciplinary academic health system. Dr. Masek has experience managing large operating budgets and a team of over 200 staff members along with extensive experience providing strategic leadership for the development and implementation of programs designed to measure financial impact and clinical outcomes of healthcare interventions.

Larra Petersen, PhD, is the Deputy Director for Business Performance and Analytics for the Division of Medicaid and Long-Term Care in the Nebraska Department of Health and Human Services. She oversees the efforts of business operations, including business portfolio management, performance reporting and evaluation, and quality improvement. She was formerly the Director of Population Health & Analytics at Methodist Health System, and Director of Clinical Integration and Population Health at an ACO. Her positions involved strategic planning, implementation, and evaluation of population health and Post-Acute Care strategies. Dr. Petersen has significant clinical experience in patient self-management of chronic disease, and has over 10 years' experience in program development and implementation, including data management and actionable insights with varied populations. She has also served as a consultant for numerous transformational coaching programs to improve operational and clinical performance.

About Nebraska Department of Health and Human Services (DHHS)

DHHS is Nebraska's largest state agency, and it is responsible for nearly one-third of state government, in terms of employees and budget. The Department provides many important, and at times life sustaining, services for Nebraskans. DHHS is comprised of five divisions, seven facilities, and eight operational areas. The five division directors are appointed by the Governor, and confirmed by the legislature, and report to the Chief Executive Officer. The divisions are: Behavioral Health (BH), Children and Family Services (CFS), Developmental Disabilities (DD), Medicaid and Long-Term Care (MLTC), and Public Health (PH).

The agency facilities are: Hastings Regional Center, Lincoln Regional Center, Norfolk Regional Center, Beatrice State Developmental Center, Whitehall Treatment Center, and the Youth Rehabilitation and Treatment Centers in Geneva and Kearney. Operational areas include: Communications and Legislative Services, Financial Services, Human Resources, Operational Excellence, Information Systems and Technology, Internal Audit, Legal Services, and Support Services.