

# Knowledge Exchange Day

## 5 July 2018

The conference will be followed by an optional Knowledge Exchange Day on 5 July which will include a range of workshops. The Knowledge Exchange Day will take place at Trowers & Hamblins, 3 Bunhill Row, London, EC1Y 8YZ. The day will run from 10am-3.30pm, with delegates attending four workshops throughout the day.

<b>10:00 – 10:30</b>	<b>Registration and refreshments</b>	<b>12:30 – 13:30</b>	<b>Lunch</b>
<b>10:30 – 11:30</b>	Session 1	<b>13:30 – 14:30</b>	Session 3
<b>11:30 – 12:30</b>	Session 2	<b>14:30 – 15:30</b>	Session 4

### Workshops

	<p><b>Better than Good? Getting to 'Outstanding'</b> Nearly 90% of retirement communities in the UK carry a CQC rating of 'good' - what do providers need to do to get to 'outstanding'? In this session, Simon Spoerer and Bel Davies from CQC will outline what 'outstanding' looks like for housing-with-care providers, and what operators can do to work towards this rating. Jamie Lindon-Lewis and Claire Charlton will outline Housing &amp; Care 21's programme of 'better than good', showing how operators are accepting the challenge of getting to outstanding care ratings.</p>	<ul style="list-style-type: none"> <li>• <b>Claire Charlton</b>, Locality Manager, Housing &amp; Care 21</li> <li>• <b>Bel Davies</b>, Operational Lead – Community Service Regulation, CQC</li> <li>• <b>Jamie Lindon-Lewis</b>, Walsall PPP Operations Manager, Housing &amp; Care 21</li> <li>• <b>Simon Spoerer</b>, Adult Social Care Policy Design Team Leader, Care Quality Commission</li> </ul>
	<p><b>Site Selection and Sales Values – What Makes a Good Site?</b> Setting accurate sales rates when considering new development opportunities is perhaps the most vital part of the appraisal process for operators, developers and funders alike. A failure to do so can lead to either too little or too much being offered for land, which could result in being outbid on an opportunity, or (an even worse scenario) paying too much for a site which may prove to be commercially unviable. Join Carterwood for a workshop exploring how they arrive at appropriate sales rates and what analytical techniques they employ to arrive at the right answer.</p>	<ul style="list-style-type: none"> <li>• <b>Matthew Drysdale</b>, Associate Director, Carterwood</li> <li>• <b>Sam Sefton</b>, Student Research Analyst, Carterwood</li> </ul>
	<p><b>Grass-Roots Marketing: Starting from the Ground Up</b> Delivering sector growth demands bolder thinking, creative depth, and greater insight into your unique proposition to your prospective customer. Powerful and engaging advertising coupled with local community engagement that delivers a depth of understanding of what you will provide for older people, results in superior levels of sales before you even open the door to your new seniors living development. Welcome to the new wave of grassroots marketing, One Fell Swoop style.</p>	<ul style="list-style-type: none"> <li>• <b>Carrie Edwards</b>, UK Chief Executive, One Fell Swoop</li> </ul>
	<p><b>Event Fees – The Investors' Perspective</b> The underlying cash flows of event fees are an attractive investment opportunity, as proven in other more mature international markets. However, the range of different fee structures have a significant effect on the value of the underlying cashflows and the ability for this value to become investment grade, as do other metrics not always in the control of the operator. As the sector grows, standardisation will only help access new funding sources, from investment opportunities to debt financing. We will look at the value of different event fee structures and the different ways in which an investment can be structured to maximise the value and attract investment.</p>	<ul style="list-style-type: none"> <li>• <b>Jose de Pablo</b>, Investment Director, Octopus Healthcare</li> <li>• <b>Domas Karsokas</b>, Senior Investment Associate, Octopus Healthcare</li> </ul>
	<p><b>Event Fees – The Valuers' Perspective</b> Do you really understand event fees and the value of them? With no standard market structure and model, we will explore some of the models in operation and the various components that drive value. We will further explore some of the lessons learned from overseas, including how their models differ and the reasons why. Finally, we will look at how the debt markets currently lend against retirement villages and how this could impact on your business.</p>	<ul style="list-style-type: none"> <li>• <b>Ben Rosewall</b>, Senior Director, CBRE</li> </ul>

	<p><b>My Life, My Death</b> The first half of this workshop will focus on how the implementation of the Gold Standards Framework in an ExtraCare location has significantly improved the lives of residents and their families. It has demonstrated improved symptom control and team communication, use of external support and expertise, increased staff confidence, while giving residents the choice to die at home with dignity. It will then discuss how Cruse Bereavement Care and ExtraCare have worked together to implement an innovative peer support model, where residents are supporting each other following a loss or bereavement, improving the wellbeing of residents (both those bereaved and those supporting them) and reducing isolation.</p>	<ul style="list-style-type: none"> <li>• <b>Louise Cottingham</b>, Village Manager, The ExtraCare Charitable Trust</li> <li>• <b>Michael Spellman</b>, Enriched Opportunities Project Lead, The ExtraCare Charitable Trust</li> <li>• <b>Eve Wilson</b>, Project Manager, Cruse Bereavement Care</li> </ul>
	<p><b>New Models of Tenure for the Retirement Community Sector: A More Bespoke Approach to Leases and Tenancies?</b> Increasingly, operators are thinking about new models of tenure for the retirement community sector, creating greater choice for customers and greater flexibility for operators. This session will look at the benefits of new models of tenure (for example, licences to occupy), but also some of the challenges of establishing a bespoke occupational agreement for the retirement community sector.</p>	<ul style="list-style-type: none"> <li>• <b>Kyle Holling</b>, Partner, Trowers &amp; Hamlins</li> </ul>
	<p><b>How to Harness Technology and Future Proof your Residents, Staff and Product</b> <i>"We are stuck with technology, when all we really want is stuff that just works."</i> Douglas Adams This presentation looks at the pressures driving today's technological revolution and asks what works, what 'has' to work and what can we do in the field of housing-with-care to make ourselves resilient and adaptable to this tsunami of tech. Audience participation is required.</p>	<ul style="list-style-type: none"> <li>• <b>Lex Cumber</b>, Business Development Director, Castleoak</li> </ul>
	<p><b>Designing Communities, not Buildings</b> What is the essence of a retirement community? Context, size, location, facilities, tenure, and independence all contribute but no two communities will be the same. This session will look to explore how human interaction through design can enhance people's experience and quality of life.</p>	<ul style="list-style-type: none"> <li>• <b>Richard Fletcher</b>, Director, Nicol Thomas</li> <li>• <b>Wendy Griffin</b>, Director, Nicol Thomas</li> </ul>
	<p><b>Big Data, Tech and the Customer Experience</b> Steven Strange, CEO of HealthMetrics, will lead a workshop on how the intelligent use of technology can improve both operational performance and customer experience. Touching on issues such as CRM profiling, systems integration and blockchain in health, the session will highlight the opportunities of 21st century retirement community operations.</p>	<ul style="list-style-type: none"> <li>• <b>Steven Strange</b>, CEO, HealthMetrics</li> </ul>
	<p><b>Building Quality into the Customer Proposition</b> There are now more than 300 retirement communities in the UK that carry the ARCO Approved Operator badge. Achieved by demonstrating compliance with the ARCO Consumer Code via external assessments, the Approved Operator status is becoming an increasingly sought-after mark of quality, demonstrating a commitment to high standards to customers, relatives, and stakeholders alike. During this session, ARCO's standards trio will provide some top tips on how to achieve Approved Operator status, and new entrants to the sector will discuss their experience of using the Consumer Code to start offering a high quality customer experience from the start.</p>	<ul style="list-style-type: none"> <li>• <b>Nick Abbey</b>, Chair of Standards Committee, ARCO</li> <li>• <b>Shandi Petersen</b>, Head of Operations, ARCO</li> <li>• <b>Alan Woods</b>, ARCO Lead Assessor, The Consultant Connection</li> </ul>
	<p><b>The Quantified Self</b> The workshop will showcase some exciting examples of how emerging technologies and social innovations have the potential to enable better aging, including non-invasive continuous health monitoring, virtual reality for extreme pain alleviation, intergenerational care models and more. The participants will follow user-centred design principles and engage in an interactive exploration of what the future of aging could look like.</p>	<ul style="list-style-type: none"> <li>• <b>Elina Naydenova</b>, Co-founder &amp; CEO, Feebris</li> </ul>
	<p><b>ARCO Academy – Opening Soon!</b> Building and maintaining a highly trained workforce is a key challenge for our sector and, with Brexit and tightening social care budgets, it is likely to become even more difficult. In line with the Vision 2030, ARCO will soon be establishing the ARCO Academy, which will help support members to train and retain their current workforce, as well as establishing the retirement community sector as an attractive and sustainable place to work. In this session, Helen Jones will share how Australia has been working to achieve these goals, including developing bespoke training certification and a university programme, while Shandi Petersen will provide insight into the UK context. The main focus of the session will be on what operators want and need to continue to build a sustainable and well-trained workforce, so be prepared to share your perspective in this interactive session!</p>	<ul style="list-style-type: none"> <li>• <b>Helen Jones</b>, Operations Director, Amicala</li> <li>• <b>Shandi Petersen</b>, Head of Operations, ARCO</li> </ul>