



## **Building for Boomers & Beyond: 50+ Housing Symposium 2007 Breakout Sessions**

**Thursday, May 31**

**10:30 AM – 12:00 PM**

### **Selling the Boom\*Boom\*Boom**

Even though customers ask for the facts, what they really are looking for is an experience. Learn how to transcend the basic sales process and power up your presentations with the real motives and feelings of each customer, how to ask the right questions and listen for the right answers. Listen through the most common objections and speed up every customer decision.

Will Nowell, ServiceTrac, Scottsdale, AZ • Steve Wolfson, Tarragon Corporation, New York, NY

### **Moving Up: Opportunities with the Urban Mid-Rise**

Urban communities want development! 50+ buyers will consider moving “downtown” to reinvigorate their lives. But, available sites are often tight, leading developers to consider going vertical - perhaps for the first time. This session will address some key development, technical and market issues as buildings head skyward. Gain some early learning and insight here before making a decision to proceed.

Gregory Faulkner, AIA, Humphreys and Partners, Dallas, TX • Cornelia Hodgson, AIA, Dorsky Hodgson Parrish Yue, Cleveland, OH • Justin Martino, AIA, The Martin Architectural Group, Philadelphia, PA • David Obitz, KTG Group, Irvine, CA

### **Good to Great: Design Studio Best Practices**

Improve your process, your product offerings and your physical environment. The nation's foremost expert on design studios shares critical lessons learned from some of the country's top builders. Overflowing with concepts, details and photos guaranteed to take your design studio and option sales from good to great.

Jane Meager, Success Strategies, Manalapan, NJ • Kellee Hansen, Centex Homes, Las Vegas, NV

### **Successful Partnerships: Bringing Active Adult and Service Enriched Together**

Explore a variety of approaches that effectively combine active adult housing with service enriched amenities. You'll get an overview of market segments and trends, examples of successful community designs and strategies such as outsourcing that provide all levels of services to the community.

Dennis Boggio, AIA, Lantz-Boggio Architects, P.C., Englewood, CO • Elisabeth Borden, The Highland Group, Inc., Boulder, CO • Kathy Dilger, Good Samaritan Connections, Boulder, CO • Randy Fitzgerald, Good Samaritan Society, Sioux Falls, SD

### **Survey Says...How 50+ Consumers Buy and Sell Homes**

With the ever increasing diversity of the 50+ market, it's vital to stay up-to-date on the latest in consumer buying and selling patterns. The Senior Advantage Real Estate Council® annually conducts research on the buying and selling process of those 50 and beyond, along with their attitudes and values. The results of the 2006-2007 surveys will be shared, plus strategies to translate that information into action and more solutions for your business.

Todd Harff, Creating Results, Woodbridge, VA • Robert Kleinhenz, PhD, California Association of Realtors®, Los Angeles, CA • Candace McGranahan, Senior Advantage Real Estate Council, Los Angeles, CA

### **The Connected Home Lifestyle**

Understanding what the active adult market wants in the way of a connected lifestyle is important to your business. Gain information from a soon-to-be published research report jointly conducted by the Internet Home Alliance Research Council and NAHB's 50+ Housing Council that will help your business develop marketing strategies and design upgrade packages, help with community planning and give your customers the home that they want. Speaker panel will include small and large builders.

Carol Priefert, Whirlpool Corporation, Benton Harbor, MI • Tim Woods, Cookson Consulting, Novi, MI

### **Intentional Elder Neighborhoods: A New Model for Aging in Community**

Elder co-housing—it's another way the baby boomers are reinventing retirement. Learn more about this innovative environmental neighborhood model that offers retirees a sense of place, sustainable design, social connections and community support.

Neshama Abraham, Abraham Paiss & Associates, Boulder, CO • Jim Leach, Wonderland Hill Development Company, Boulder CO • Don Tucker, Eco Housing Corporation, Bethesda, MD • Chuck Durrett, McCamant & Durrett Architects, Inc., Nevada City, CA

### **The New Active Adult Community: Addressing Lifestyle Diversity**

Buyers are seeking communities that allow them to live the lifestyle they are accustomed to while eliminating responsibilities associated with home ownership. Learn how to capture a share of this lucrative market with winning community planning techniques that recognize the special nature of 50+ buyers.

Peter Crowley, LandDesign, Alexandria, VA • Chris Grady, KEPHART Community.Planning.Architecture, Denver, CO • David Jensen, David Jensen Associates, Inc., Denver, CO

**1:30 PM – 3:00 PM**

**Creating and Maintaining a Lifestyle that Sells**

How can you create and maintain a lifestyle that sells? Hear how from the community manager, marketing and lifestyle coordinators and management company staff at the successful K. Hovnanian Four Seasons active adult communities in New Jersey.

Stephanie Duncan, K. Hovnanian Homes, Jackson, NJ • Michael Pesce, Community Management Corporation, Clifton, NJ • Randy Simat, K. Hovnanian Homes, Jackson, NJ • Patricia Tanis, K. Hovnanian Homes, Jackson, NJ

**What Can I Say? Legal Considerations when Marketing and Selling 50+ Housing**

Marketing to 50+ buyers can be a minefield for Fair Housing awareness. Plus, in an age of greater mobility and multiple residences, your market can often come from states beyond your own. Learn how to expand your marketing reach while remaining compliant with the law.

David Herrigel, Hyatt & Stubblefield, PC, Atlanta, GA • Janet L. Bozeman, Hyatt & Stubblefield, PC, Atlanta, GA • Phil Darrow, Pulte Homes, Inc., Huntley, IL

**Starting Out! How to Organize for a Successful Grand Opening!**

Entering the active lifestyle community market segment requires a new way of reaching your qualified prospects. This program will detail the steps to follow from beginning the zoning process through your grand opening.

Bill Becker, The William E. Becker Organization, Inc., Teaneck, NJ • Bill Slenker, Slenker Land Corp., Burke, VA • Janis Ehlers, The Ehlers Group, Fort Lauderdale, FL • Rich Carlson, Carlson Communications, Northborough, MA • Frank Guengerich, WTS International, Rockville, MD

**Beyond Sun City: Exciting New 50+ Designs for Home and Community**

Niche groups of 50+ buyers are looking for something unique. Appeal to 1% of this 100 million person market and you have one million customers all to yourself. This session highlights the community designs that deliver the individualized lifestyle customers want.

Charles Durrett, The CoHousing Company, Nevada City, NV • Mike Kephart, KEPHART Community.Planning. Architecture, Denver, CO • Steve Shraiberg, Esprit Homes, Greenwood Village, CO

**Doing More with Less: The Small Space Phenomenon**

As more Boomers downsize, they want builders to provide a custom look and feel in a smaller production home. Here are the floor plans, elevations and merchandising from both architects and merchandisers that deliver what your customers want.

Anne Olson, Olson Architecture, Niwot, CO • Doris Pearlman, Possibilities for Design, Denver, CO

### **Newest Information to Determine Market Potentials and Pinpoint Competitive Threats**

Get the information you need about Independent (Congregate) Living and CCRCs. With this data you can project market penetration for your new or re-tuned project, forecast financial results before land purchase, construction, or financing and identify important benchmarks for auditing operations, financing due diligence and more.

Michael Hargrave, National Investment Center for the Seniors Housing & Care Industry, Inc., Annapolis, MD • Anthony J. Mullen, Best Practices Analytics, Havertown, PA • Harvey Singer, REDMARK Economics of Real Estate Development + MARKet Research, Columbia, MD

### **Trends in Active Adult Multifamily Apartments**

Hear about the latest trends in the active adult rental apartment market from nationally recognized experts. You'll get the results of a national active adult study and design trends that address this market's desires, plus case studies that deliver the sites, building configurations, exterior design and details that succeed.

Ed Hord, Hord Coplan Macht, Inc., Baltimore, MD • Margaret Wylde, ProMatura Group, Oxford, MS

### **Getting It Right! Sharpening Your Skills at Increasing Your Bottom Line**

Informed decisions are critical for a good bottom line. Get a thorough understanding of the factors that affect your profitability: site selection criteria, density analysis, product selection, capitalization choices and financing decisions. This program will stress modeling that promotes accurate project decision making.

Chuck Covell, Covell Communities, Gaithersburg, MD • Leslie Marks, Marks Collaborative, Gaithersburg, MD • Timothy McCarthy, Traditions of America, Philadelphia, PA

### **3:30 PM – 5:00 PM**

#### **Boomers—Online or Oldline Homebuyers?**

This high-energy seminar is packed with practical information about online marketing and the boomer audience. Learn the hottest trends for the 50+ market in website design and development, search engine marketing and eLead management.

Meredith Oliver, MIRM, CSP, Meredith Communications, Orlando, FL

#### **Referrals: The Key to Maximizing Return on Investment**

A leading authority on customer satisfaction research will show you how you can dramatically increase sales and profit simply by increasing referrals. You'll hear the findings from his company's referral study as well as a top builder's perspective on how customer referrals can make a difference in your company's bottom line.

Paul Cardis, NRS Corporation, Madison, WI • Rich Staky, John Laing Homes, Denver, CO

### **Kitchens and Master Suites: Two Keys to the Hearts of Boomers**

Boomers are demanding and difficult to categorize. They expect innovations in design. Nowhere is this more apparent than in kitchens and baths. This session will explore the design and product directions for these two critical spaces with an emphasis on universal design and other lifestyle issues.

Mary Jo Peterson, Mary Jo Peterson, Inc., Brookfield, CT • Robert Williams, KTG Y Group, Inc., Irvine, CA

### **Creating the Environment that Will Attract the New 50+ Buyer**

New buyers are looking for more than a home—they're looking for an experience. Discover the latest ideas in entries, clubhouse amenities and single family and multifamily buildings that can help you capture this large new segment of 50+ buyers.

Don Jacobs, JZMK Partners, Newport Beach, CA • Steve Moore, Bloodgood Sharp Buster, West Des Moines, IA

### **The New View on Expansion into Smaller Markets**

This session explores an innovative approach into the development opportunity of senior housing within smaller markets. A case study will be presented to show the value of utilizing comparable market research to demonstrate new development opportunities while increasing housing and service options within smaller markets.

Jeff Mann, Senior Housing Consultants, Inc., Cedar Rapids, IA • Bruce Takes, Senior Housing Consultants, Inc., Cedar Rapids, IA • Mark Takes, Senior Housing Consultants, Inc., Cedar Rapids, IA

### **A Green Toolkit**

Today's 50+ customer is more aware of environmental issues than ever. This program will share practical measures in utilizing green technologies and specific methods that can be implemented immediately. Listen to successful strategies being used by builders and what the 50+ consumer is expecting.

John Binder, KEPHART Community.Planning.Architecture, Denver, CO • Ed Hord, FAIA, Hord Coplan Macht, Baltimore, MD • John Kurowski, Kurowski Development Co., Littleton, CO • Jared Spahn, Old Town Construction, LLC, Woodstock, MD

### **Is New Urbanism for the Boomer?**

How does New Urbanism satisfy the Boomers' desire for community and a sense of place? We will present the principles of New Urbanism and Traditional Neighborhood Design and correlate the 55+ market with these principles, plus show you communities that have already applied these principles to great effect.

Leslie Marks, Marks Collaborative, Gaithersburg, MD • Douglas J. Parkins, RLA, CNU, RETTEW Associates, Inc., Lancaster, PA • John Van Fossen, Looney Ricks Kiss, Celebration, FL

## **Translating Long-Term Strategic Planning into Action for 50+ Community Development**

Explore the process of translating vision and ideas into action and learn how to capture the full potential of trade partners and consultants. You'll study key strategic considerations in land acquisition and deal structures, land planning and development, competitive assessment, community development, and product programming.

Cynthia R. Dickerson, John Laing Homes, Denver, CO • Mark Schickner, John Laing Homes, Denver, CO • Richard Staky, John Laing Homes, Denver, CO • Tyson Taylor, John Laing Homes, Denver, CO

**Friday, June 1, 2007**

**10:45 AM – 12:15 PM**

### **After the Grand Opening...What's Next?**

Your company has had the right mix of product, marketing strategy, posturing and positioning to gain a competitive edge and led you to have a successful grand opening. Now... learn how to mold these exciting prospects into buyers and continue the momentum for a productive sell-out.

Bill Becker, The William E. Becker Organization, Inc., Teaneck, NJ • Jane O'Connor, Mature Living Choices & 55 Plus, LLC, Hawley, MA • Michael Rich, Harbor Hills Development, Lady Lake, FL • Adam Rosenblum, The Palace Management Group, Miami, FL

### **Web Site Laboratory Roundtable**

Is your website working for you or against you? Do you want to convert more website visitors into leads? Need more information on the latest trends in website design and development? Our experts will review your website and give you valuable feedback to help give you the upper edge on web site marketing.

Rich Carlson, Carlson Communications, Northborough, MA • Todd Harff, Creating Results, Woodbridge, VA • Meredith Oliver, MIRM, CSP, Meredith Communications, Orlando, FL

### **All That They Ask For...Tips for Getting More For Less**

Today's 50+ homebuyers want everything, but they don't want to pay top dollar. Learn how today's builders are addressing this issue and delivering outstanding value for homebuyers. Now your customers will feel like they are getting all that they ask for and more.

Lita Dirks, Lita Dirks & Co., Denver, CO • Ashley Cook, Centex Homes, Albuquerque, NM • Sandy Fennell, Deveraux Architects, McLean, VA • Jennifer Lambert-Pingrey, Village Homes of Colorado, Engelwood, CO

### **Designing for Today's 50+ Buyer: The Top 10 Elements for Successful Homes and Communities**

Designing today's successful homes and communities rely on a formula. Are you doing what it takes to guarantee your success? Learn the 10 key elements to

include when creating homes and communities for the new generation of active adult buyer.

Cheryl Schuette, Village Homes, Englewood, CO • Chris Mohr, DTJ Design, Boulder, CO • Dan Swift, BSB Design, West Des Moines, IA

### **Shape Up or Ship Out... Embracing the Changing Shape of Senior Living**

Can you adapt to the changing adult market? This session will examine market research, design, operations and sales to learn how the senior housing industry has changed over the past decade and show how successful communities have adapted.

Ken Baker, Thompson, Hancock, White & Associates, Inc., Atlanta, GA • James F. Bernado, Presbyterian Homes, Inc., Camp Hill, PA • Susan B. Brecht, Brecht Associates, Inc., Philadelphia, PA • Bruce B. Rosenblatt, Bruce Rosenblatt Sales & Marketing Consulting, LLC, Bonita Springs, FL

### **Building a Boomer Friendly Home**

It becomes increasingly apparent that the long anticipated wave of boomer prospects is going to "do it their way" when choosing their next homes. Boomers are different from any buyers builders have sold to before. A panel of builders will share their experiences in developing homes and products that are boomer friendly.

Myril Axelrod, Marketing Directions Associates, Inc., New York, NY • Steve Maun, Leyland Alliance, Tuxedo, NY • Dave Smith, Cambridge Homes, Division of D.R. Horton, Libertyville, IL • Tom Troy, Sharbell Development Corporation, Robbinsville, NJ

### **Returning to Campus**

Retirees are flocking back to campuses across the country, attracted by the many benefits which campus towns enjoy (and perhaps a bit of nostalgia). Universities are partnering with builders to offer an integrated product, including access to lectures, seminars, cultural events and superior medical care. Participants will learn what drives this fast-growing trend and gain an understanding of both the opportunities and obstacles to success.

Andrew Carle, George Mason University, Fairfax, VA • Leon Pastalan, University of Michigan, Ann Arbor, MI • Stephen Roof, ISA Properties, Clemson, SC • Matthew Weaver, PRAXEIS, Jacksonville, FL

### **Classic Market Segmentation Strategies for 50+ Housing Opportunities**

For the active adult population, one size does not fit all. Hear about classic marketing tools you can apply to decision-making for 50+ buyers, including market research, demographics, psychographics, brand identity creation and definition of discrete buyer profiles for marketing and merchandising decisions.

Cynthia R. Dickerson, John Laing Homes, Denver, CO • Tracy Plimpton Lux, Trace Marketing, Inc., Sarasota, FL

**12:30 PM – 2:00 PM**

### **Connecting! From Statistics to Sales**

You have all the demographic research data and consumer trends. How do you translate that into a compelling marketing message and sales environment? With examples from successful large and small homebuilders, this presentation will show how to create a unique community “personality” that connects with today’s active adult—all on a modest budget.

Susan Shook, Susan Shook Associates, LLC, Newport Beach, CA • Jim Murar, Santa Rosa Development Group, Newport Beach, CA • Danny Goodman, Del Webb, North Inland Empire Division, Indio, CA

### **From Youthquake to Agequake: The Transformative Future of the Baby Boom Generation**

Discover what motivates the Boomer generation. Insights about their values and life perspectives can inform critical decisions beyond brick and mortar.

Understanding this generation can also revolutionize thinking about the social, interpersonal, and even spiritual elements of housing in the future.

Brent Green, Brent Green & Associates, Inc., Denver, CO

### **Don’t Miss Your Niche: Higher Density Solutions Appeal to Boomers, Too**

Lifestyle choice, affordability, infill issues and location are all contributing to a discovery of new product types for active adult buyers. This program will explore the higher density versions of single family and attached housing that are successfully selling to the active adult market today.

Rich Carlson, Carlson Communications, Northborough, MA • Gary Snider, AIA, BSB Design, Boston, MA • Doug Van Lerberghe, KEPHART Community Planning Architects, Denver, CO

### **Turn Dreams Into Reality... A Hands-On Design Exercise**

Join a team of your peers and design your own version of the perfect home for an active adult family. Compare your design against other teams' designs to see how well you understand the active adult boomers. It's fun, exciting, and everyone learns from each other.

Mike Kephart, KEPHART Community Planning Architecture, Denver, CO • Don Jacobs, JZMK Partners, Newport Beach, CA

### **Trends and Innovations in Senior Housing Design**

This session will outline the innovations and future trends being designed and implemented in senior housing. Speakers will discuss issues being faced by owners and operators in the industry. Through case studies, presenters will illustrate how problems were solved to the benefit of residents and staff. The session will be an enlightening discussion for architects, facilities managers and owners.

Steven H. Ruiz, AIA, BeeryRio, Springfield, VA • Richard Rosen, AIA, Perkins Eastman, New York, NY • Camille Thompson, Christian Living Communities at Holly Creek, Centennial, CO

### **Rightsizing – The New Boomer Lifestage**

Life isn't as simple as downsizing anymore. Making room for grandchildren, an aging parent, keeping multiple residences, a home base for travel—life is full of emotional choices unique for everyone. Come hear how to approach the conversation and leverage its powerful impact on housing decisions.

Barbara Kleger, KD Partners 55+ Consulting, Philadelphia, PA • Margit Novack, Moving Solutions Franchise, LLC, Havertown, PA • Ciji Ware, Sausalito, CA

### **Tourism & Relocation – The New 'Lifestyles' of Active Adult Communities**

Many retiring Baby Boomers are seeking active adult communities mixed with resort, entertainment and hospitality amenities. And, communities are beginning to understand the synergy between tourism and retiree relocation. Learn how developers of active adult communities are creating specific environments and all-inclusive 'lifestyle destination' for their residents.

Greg Lyon, KTG Group, Irvine, CA • Alan Church, Thomas, Warren + Associates, Phoenix, AZ • Bill Slenker, Slenker Land Corporation, Burke, VA