

Intro

Welcome to season eight of Bridge the Gap, a podcast dedicated to informing, educating, and influencing the future of housing and services for seniors. The BTG network is powered by sponsors, Aline, NIC MAP, Procare HR, Sage, Hamilton CapTel, ServiceMaster, The Bridge Group Construction, and Solinty and produced by Solinity Marketing. Bridge the Gap in three, two.

00:28 - 00:38

Lucas McCurdy

Welcome to Bridge the Gap podcast, the senior Living podcast with Josh and Lucas. An exciting episode today with our friend and returning guest, Dave. Welcome to the show.

00:38 - 00:46

Dave Schless

Pleasure to be with you. Lucas and Josh, always, always enjoy the opportunity to spend time with both of you. So thank you for having me.

00:46 - 01:52

Lucas McCurdy

Absolutely. Well, today, for our longtime listeners, they know that we're going to be talking about the ASHA membership meeting, and we have the details right here. It's going to be the 2026 annual meeting in Arizona at the Biltmore, which is a great location. You have, we've been there before, for an annual meeting. It's a great spot.

And that's going to be January 26th through 28 to, in January. So in 2026, kind of some of the same issues will be pressing the industry and maybe some new ones. It seems to me that the attitude and the atmosphere in 2025 have been very optimistic and a lot of momentum, even though that development is still somewhat sidelined. I think that there's a lot of hope that that would change in 2026. So at this annual meeting, can you pull back the veil a little bit? What do you think are going to be some of the major conversations that will be had in January at the Biltmore?

Dave Schless

01:52 - 16:18

Certainly, I think the industry, the industry is feeling more optimistic. Certainly, on the transactional side, you're starting to see transaction volume really pick up. I suspect that will continue into 2026.

So there's there's a lot to I think there's a lot to be optimistic about, an enthusiast about. But at the same time, as both of you guys know, there's just a lot of complexity in different, different areas. I mean, certainly, the workforce challenges continue to be out there. And of course, that would also affect those who are looking at this from the new development side construction business. You've got capital markets and interest rates, and so that's, there's never a moment in this industry where there aren't a lot of different competing things to grapple with if you're an investor or a lender or an owner and operator and developer.

And, I think, hopefully, what we'll try and do with the new building is, both, the, the various, sessions that we have planned as well as certainly the, the networking, the informal, time that we really, consciously build into our, meetings, we'll allow a lot of, peer to peer conversation and thinking and information sharing and, that's, when when we started off. Sure. Which actually, next year, the 35th anniversary, which is kind of amazing for me to think about all but I mean, when we started this organization 35 years ago, in 1991, it was smaller, but it was also essentially a forum to allow industry leaders to discuss pressing issues of the day.

And obviously, we we started in probably and ten of, 10 or 15 people sitting around, sitting around the table. Now, this annual meeting has probably 850, 900 attendees. So the system was bigger. But I think, conceptually, what we've always tried to do with this annual meeting is, have really provocative sessions, encourage people to be candid, encourage people to share information and ideas, in, in all of the sessions, and then also we build in, kind of this, upward opportunity in informal that, informal or formal activities for just, opportunities for people to really connect with other industry leaders. It may be a less intense atmosphere. So that is that formula's really been the same, for 30 for next year, be, 30, 35, obviously, we spent the first year we spent the first ten with the National Multifamily Housing Council. So that's that's the, that's really what we do.

And, to some extent, because, virtually all of our attendees are senior level, folks that I mean, saying it's it's better, but it's it's probably easier for us because the audience is, there's a sophistication level that is, pretty uniform, through the eyes of attendees who come to that annual meeting and, that's, that's always that's always the goal.

And, I think, I think we have a really nice variety of sessions that touch on all of the things that our members in our industry are thinking about, from economics. And we've got to, I think, a really interesting keynote speaker, we've got this Matt Slaughter, he is the Dean of the Tuck School of Business at Dartmouth.

And so he, he'll he'll kind of set this center stage and, we, we have on many occasions used economists for that kind of opening session. I think he'll be terrific. I mean, he's got a lot, he's got a really interesting economic and global kind of geopolitical perspective, which I think is obviously a lot of, a lot of things going on that are impacted obviously by the global economy, money and interest rates, and geopolitics.

So I think he'll be I think he'll be fascinating. And then, the likewise, the various sessions, we we're, we're getting into all of the stuff that we focus on and care about. We've got a CEO type panel, we've got a panel that will be looking at leveraging technology, AI to be more efficient.

And again, we know how important those issues are for the operators. To me, how can we do all of this better? How can we, how can we figure out how to be more efficient so that we can keep our product as reasonably priced as possible? Obviously challenging. Again, I think we have a really interesting capital markets panel that Rebecca Bloom of Columbia Pacific will moderate, and that will be focused, with different, different perspectives on how to deploy capital in the space from an investor perspective.

We've got a case study that will do that. I think it will be really interesting that our friend Arnie Whitman is kind of helping us pull together. And it's actually a property in Tennessee that was purchased a few years ago. It's the river, the rivers that Maryland farms, and then it really this is this will be a case study in kind of the transformation of, I'm I'm gonna say, I think it was, probably in the early 90s, vintage ale property.

And how do you, how do you transform a property into something that is modern? And the focus on this is also very much, technology and systems, and information. We'll be doing our kind of normal, normal, some of our normal breakout sessions. Obviously, we always like to have a legal, risk management type of session.

And that is an area we focus on where you're kind of getting into some of those nitty-gritty details about the intersection of legal issues and operations. And, again, real open, real open dialog there. We've got Jim Gray from Bridge Wood and Jean McLean Delgado, who heads up our government affairs.

They'll be getting it, getting into a policy discussion. So again, we are part of the, I would say, daily grind of work more up on Capitol Hill, irrespective of what's going on around us. I mean, , with members of the House and the Senate, both parties and, , so they'll they'll I, , I think have a really fascinating conversation about the work that we're doing, , very focused, certainly on the immigration slash workforce issue, opportunities to, , potentially, , make some positive changes there and then, , the range of other things that we focus on and care about. Certainly, for sure always care about capital flow. And so, the GSEs, government-sponsored enterprises, also known as Fannie Mae and Freddie Mac, boom, kind of in the realm of some potential changes from the Trump administration.

So, again, very, for us, really, really top priority because the role that Fannie and Freddie have played in senior housing since the late 90s is just enormous. And so that'll be a great discussion. We have a kind of a, session that, that is, is really a workforce, program that we're kind of doing in conjunction or hosting in conjunction with, , group of industry executives that, , wanted to pull this, initiative together, which is, very, very enthusiastic and will be a part of, and so that's a session that, Jacqueline Kong will be part of spearheading, along with Lynn Katzman, from Juniper. Tom. Great. From, from, benchmark and Madson for leisure care, John Cochrane from Human Good. And, we will have a couple of really interesting speakers, a couple of former executives from the Four Seasons Hotel company who are going to be helping us through that session.

So, I think, I think we we just have a lot of important topics that we're going to get to. I also definitely note, again, the topic that is probably as challenging as anything in the industry, but we will have a session that will look at expanding access to lower-income seniors. And that will be a session where we'll look at a range of things.

We've got Kevin Laidlaw from New Point Real Estate Capital moderating. Shalini Neira from Freddie Mac will be a part of that conversation. Greg Eccles from Garden Management Services and Pilar Carvajal of Innovation Senior Living. So again, a really challenging topic. I know you guys know this as well as anyone, so we don't shy away from those topics that are, they're just to challenge.

There's no easy way to do it, but we know it's of critical importance. So, , both of them, , those are kind of the, the sessions that, , of off the top of my head, I think, , people will be, , really interested in I didn't I didn't like to point out to I know we've got this session that we, we have not really focused that much specifically on wellness and kind of doing wellness.

Well, in senior living. And so we had Colin Milner, who is the founder of the International Council on Active Aging, and he helped us kind of pull this session together. So we've got, , a really good panel, who will help us with that session in addition to Colin? Well, Leanne Bronstein of, Jen Care Lifestyle will be on that, Dr. Sue Paul with Asbury Communities, and then Ginger Anzalone from Vesta Property Services.

So you have a wide range of topics that, I think, provide, backdrop to a lot of the different types of issues that the industry's thinking about and working on and moving towards. I should also say, I think the case study I, I was talking about the technology, but the case study that I mentioned that Arnie Whitman is helping us with it also has elements of the investment side.

But it's also very tied to value-based care, and, looking at ways to improve, use technology to improve the outcome for both the staff and the residents in the community. So that kind of calls that we know how important the value-based care is to the industry as well. And I don't I don't think I'm missing anything, but so lots of lots of good sessions that'll take place over the course of, basically, a day and a half, also obviously complemented by some pickleball, some golf, some group hikes, and a group bike ride. So as I said, we like to like to try and make this a meeting that people look forward to participating in.

16:18 - 18:20

Josh Crisp

Well, Dave, first of all, congratulations on 35 years. That's hard to believe. You guys have been putting in work, representing the industry for a long time. And. Congratulations. Wow. Well, I'm always amazed and thankful to be at these events. Because it's amazing how many people you bring together and how much you pack into just a couple of days, while also, when I started hearing everyone you have lined up, which is a list, I'm telling you, everybody recognizable on that list.

So some heavy hitters that are assembling, out in Arizona in January, but you cover every aspect, and and then not only that, but, you guys do such a wonderful job curating the experience because, , from my standpoint, not only do you get this great, education and, and thought provoking conversation and sort of problem solving that you get to do together around the table.

But the experience, even outside of the sessions and the panels, those conversations that happen over golf or an excursion, together or breaking bread together, coffee. I think those are priceless, in my opinion. So, just well done. I know your team works tirelessly all year round to curate these experiences in this education and these conversations.

So thank you for all you do. Thank you for allowing Bridge the Gap to be a media partner. No teaser here, Bridge the gap will be again, podcasting. Lucas and I always look forward to the conversations. It's a real honor to be able to sit down with the thought leaders that you assemble in one place and

be able to share some of that conversation and connect them to our audience, and vice versa. So , Lucas, what an opportunity. I'm getting excited already.

18:20 - 19:07

Lucas McCurdy

Yes. We are always very, very excited about it. And, this is a great rundown for what to expect in 2026. So, to round out the conversation, as this year comes to a close and we look into next year, ASHA has two membership meetings, and it is important too because there are a lot of new people in the industry.

Right, Dave. And so people are looking at, their calendars and saying, hey, what can I attend for next year? And are shares a little bit different than other associations or other conferences in the fact that you need to be a member to attend? This is a member meeting. Can you explain that a little bit as we kind of round out the show?

19:07 - 24:15

Dave Schless

Absolutely. I mean, first of all, it's always a pleasure to have you guys participating in these meetings. So we value that relationship and bridge the gap very much. And also admire the work that you do, telling the stories and, really important ways, the so, there's always been a little bit it's always been a little bit different.

So for us, where we're very different is, we don't view the meetings as a source of revenue, which is the it's the outlier. I mean, every other group out there, the meetings are a source of revenue. It's a moneymaker. And so the incentive is, , we need to have we need to pack as many people in as possible, and, for us, again, and I don't I don't necessarily take credit for it.

I mean, we modeled ourselves after the National Multifamily Housing Council, which was the group that hired me, and we started this in 1991. And so for us, the bigger role is not how many. It's who do you get into the program to participate and focus on that.

And I think that that has always been the driver. So we don't have an incentive to have 3000 people at the meeting. We don't have an incentive to have the trade show. For us, we want to have industry leaders participating. But the size of the meeting, frankly, the size of the membership is just not important to us.

It's it's it's always been secondary. And so, we've always, we've always kind of kept it as a membership meeting, which, among other things, we have people that are, generally speaking, committed to the industry. They're all different. Obviously, the companies range in size from really large investors, owners, operators to companies that have 5 to 10 properties or, for-profit, not-for-profit.

So, the forum for us is not about having thousands of people. It's more about the quality of the the meeting itself and the conversations. And, another thing, I always I always say this, this also just kind of goes back to the beginning, when we started, I was there was always a conscious decision.

And you guys know, because you've been to many of our meetings, we always say at the outset that the meeting is off the record. And we do that because we want to encourage people to be candid. We don't invite the media. So now it is true. We have, members who are part of the media and they participate in meetings, but they're not they're not they're not broadcasting meetings.

They're not writing about the sessions. And that was a very conscious decision that was made and revisions made, initially in the early 90s. And we've revisited it, to some extent, there's a downside to that. I, we I would say, I think there are things that I said do that, we're, and I'll say this to myself, I mean, I'm just I'm not really begging to do my own laundry.

We just don't do that very well. There's a downside to that, where we're not. If you're a member, obviously, you're getting our research and you're kind of seeing what we're doing. It's not, you probably don't know, some of the things that we're doing. But that's, first, that the member meeting has that format has worked very well.

Now obviously, we have different levels of membership. So we have some people who get involved at the associate level and kind of dip their toes in. They can participate in the annual meeting. And then the mid-year meeting is even, , even more intimate for us, will be in Napa Valley in June, which will be the first time for us having a party meeting in Napa.

So we're looking forward to that. As you mentioned, Lucas, I think the Arizona Biltmore has been the site of probably at least ten or more annual meetings. And it just works, really well for us and for our members. So, I have no doubt we'll be back after 2026 as well.

24:15 - 24:33

Lucas McCurdy

Well. Very good. We're looking forward to it. Thanks for your time today, Dave. And we'll make sure that all of these links get put into the show notes for this podcast so people have easy access. Dave, thanks for your time this morning, and looking forward to seeing you in Arizona in January.

24:33 - 24:44

Dave Schless

My pleasure. Looks forward to seeing the whole Bridge the Gap team. And as always, thank you for your great work and always, always a pleasure to be on the podcast.

24:44 - 24:57

Lucas McCurdy

And for our listeners. If you want to learn more, click those links and become a member of Osseo and join us in January, and go to btgvoice.com. Download this content and so much more. Thanks for listening to another great episode of Bridge the Gap.

Outro

Thanks for listening to Bridge the Gap podcast with Josh and Lucas. Connect with the BTG network team and use your voice to influence the industry by connecting with us at btgvoice.com.

