



SENIOR HOUSING NEWS

CHANGE MAKERS

The **pioneers** driving the **future**
of senior living



BROUGHT TO YOU BY 

Creating the future of senior living

The ability to change is separating the winners from the also-rans in senior living.

That's because fundamental aspects of the business are rapidly evolving, and the future will look very different than today.

Payment models and referral patterns are shifting, baby boomers are bringing new expectations, technological innovation is transforming every facet of operations, new entrants are coming from other industries, and capital sources are becoming more numerous and sophisticated.

In this environment, the industry needs Changemakers more than ever. These are individuals who embrace the need for change and have the boldness and savvy to execute new ideas.

After careful consideration, Senior Housing News identified nine Changemakers and conducted in-depth interviews with them, in a series sponsored by Yardi.

We are proud to introduce the inaugural class of Changemakers. Read on to learn what makes these visionary leaders tick and how they are transforming senior living. And check out seniorhousingnews.com/Changemakers for complete interviews.

CHANGEMAKERS

Maria Oliva

COO of Pathway to Living

CLAIMS TO

CHANGE

- ✓ Creating a wellness-focused operating model
- ✓ Developing a multi-brand portfolio
- ✓ Serving the middle market for senior housing



Pathway to Living COO Maria Oliva entered the senior living industry 27 years ago and has been a Changemaker ever since. From creating a wellness-focused operating model, to developing a multi-brand portfolio, to serving the middle market, Oliva has broken ground that others follow.

What are some changemaking efforts you're most proud of?

I think it was 12 years ago, we set the strategic plan for this organization to grow. We decided we need to change the way society thinks about aging and senior living.

We started by asking, why do we exist? Why would someone choose a Pathway community versus any other community in the market?

Personally, I felt, why aren't people interested in moving to seniors housing? People come reluctantly. It's need-driven. I felt that we needed to address that issue.

That's how we decided to then focus on what's [become] our operating philosophy.

It was really this paradigm shift in thinking about people making a choice to live here in seniors housing because they want to live the best life possible with the right resources, versus remaining in their home with reliance on friends, neighbors, other caregivers [and] then piecemealing whatever socialization you could get.

Do you thrive on change or are you generally more cautious?

We do these personality profiles and mine is a "quick start." I'm usually the first one to say, "I think we should try to do that. Let's prove why it can't be done."

When I would say, I think we need to redesign all the job descriptions and people need to have an ability to share their talents, I would go to the HR and say, "Think about it then come back and tell me why it can't be done."



COMPANY HEADQUARTERS

Chicago, Illinois



Most of the time, most people aren't going to come in and say, "Here's why we can't get it done," because then I would take their approach and say, "Okay, you see that as an obstacle. What about if we remove that? Is that possible?" And they'll say, yes. Great, explore that then come back.

Eventually we'd get to, "Boy, we really should pilot it."

RESUME REVIEW



What are some traits or skills that allow you to be a Changemaker?

People will describe me and say, “You evangelize.” I’m passionate about this work, I’m passionate about the mission that we set forth.

It’s about, how do we get people to join the journey? How do you change a mindset, how do you retrain yourself if you’ve been in this industry a long time? To think differently, to speak Viva, to welcome change and not resist it. Because we’re going to change, even when there’s no [pressing] reason to change. Because we want to move forward.

And I think people would say in order to lead organizations through change, through growth, you have to have trust. And I believe in establishing trust. I’m not afraid to stand and say, “The thing didn’t work, we screwed this up.” Or, “We’re going to take these chances and we’re going to do these things and here’s why we should do these things.”

When you grow, it’s even more important to keep those lines of communication. To

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**People will describe me and say, “You evangelize.”
I’m passionate about this work, I’m passionate
about the mission that we set forth.**

tell people, “Here’s why these things are happening, good, bad, ugly.”

I also think that from a leadership perspective, as much as I can be passionate and I can be enthusiastic, you have to maintain calm, you have to say, we’ll get through this, here’s why we’re going to get through this.

Do you think senior living is changing fast enough?

I do. I think it’s going to take some real innovators. And I think we’re starting to see responses from some of the industry organizations, but I don’t know that necessarily there’s the full alignment. There are different, diverging priorities.

I do think there should be a more collective approach to deal with the challenge of workforce. I think there are some opportunities to address immigration. I think there are some opportunities to look at how we attract new talent.

And how do we change how we deliver the care and services? How do we streamline jobs and systems that don’t necessarily require the human touch, and how do you make that meaningful? It’s going to take a while to do that. And I think there’s not enough of that. At least we’re making strides.

And when you look at the various companies, I think people are starting to see the need for this health care focus.

TIPS FOR MAKING

CHANGE



Welcome change,
don’t resist it.



Don’t be afraid to
screw up.



Maintain calm.

ROLE MODEL FOR

CHANGE



Steve Jobs

MARIA

SAYS

I’m usually the first one to say, “**I think we should try to do that.** Let’s prove why it can’t be done.”

2005

Oliva joins Pathway
Senior Living

2017

Pathway Senior Living
rebrands as Pathway to Living

CHANGEMAKERS

David Eskenazy

President of Merrill Gardens



CLAIMS TO CHANGE

- ✓ Pioneering data-driven operations
- ✓ Leading Merrill Gardens into the Chinese market
- ✓ Spearheading an innovative spirit



David Eskenazy has earned the status of senior living Changemaker by being a pioneer in data-driven operations, helping lead early forays into the Chinese market and keeping the spirit of innovation alive at a provider known for taking risks.

After four years as CFO and President at Seattle-based Aegis Living, Eskenazy became president of Seattle-based Merrill Gardens in 2015. At the time, Merrill Gardens had just significantly trimmed its portfolio to enter a new growth phase with a heavy focus on technology, and Eskenazy has played a key role in creating more streamlined systems to avoid a “whack-a-mole” approach to operations.

Today, Merrill Gardens’ portfolio numbers 33 U.S. communities, and Eskenazy is also supporting the company’s efforts in China. It is one of only a few U.S.-based senior living providers helping develop communities for the vast aging population in China.

Describe some changemaking efforts you’re particularly proud of?

I’m kind of a data nut.

There’s this theory in the industry that’s kind of

whack-a-mole: Just about the time you get these communities fixed, something else will break down over here, and then you go to try to fix those and something else will break down over here. You can never have every community up running at full efficiency at any one time.

To me, it’s just a nonsense theory.

If something is breaking down, you have to know what it is and how to find it quickly before you can go about trying to fix it. To do that, you have to have information in a way that all your managers can understand very quickly.

So, fundamentally changing all reporting was something I thought was really important.

Our classic system of information recording has a whole bunch of rows and a whole bunch of columns and a whole lot of black and white. I used to say to my managers, “If I give you this report and I gave you three minutes, and you’ve never seen this community before, I want you to tell me how this business is doing — where are they doing really well, where are they having challenges and where are we likely to focus our efforts to fix it. Go.”

After three minutes, oftentimes they would just get used to what the rows and columns meant and what was on each page.



COMPANY HEADQUARTERS

Seattle, Washington



Executive directors have so many things coming from so many places. It’s probably the hardest job I’ve ever seen in my life. They don’t have time to study the kinds of things that we might have the time to study in the home office.

And so we built. We started this at Aegis and we continued it at Merrill Gardens, to the point where I believe now we probably have the most sophisticated business analytics tools in the industry, and we can dial in on every element of the business very, very quickly. I can hand a set of reports to a manager and they can see two years’ worth of history and trends in every key area.

They can dial in on any particular matter, whether it's a sales function or a care function or an expense matter, and see exactly where things are breaking down, and they can do that very quickly. Building a business analytics function behind the organization was something that was critical, and I think we've done an amazing job at it.

Can you describe a change you've brought to the company's corporate management?

There's one thing I did want to improve when I first came to the company, and it's one of the few things that I thought could be improved upon.

I asked the question, "On this particular item" — and I asked this of the management team — "Can somebody raise their hand who is in charge of this?" And no hand went up. Then I said, "Is it that we're not paying attention [to this], or is it that a lot of you think you're in charge, or that nobody knows who's in charge?"

I'm looking for the outcomes.

And so I went about saying, okay, I need a top ten list. Which things do I think are so important, when I ask this question, I really need a hand to go up? I'm going to make that list and I'm going to make sure that a hand goes up for every one of those things. We might have another ten below it, but we'll work on these ten first.

Do you thrive on change or do you think of yourself as more cautious?

I'm looking for the outcomes.

A long time ago, a professor in technology told me about the elements of programming. He

said, "Forget how you're going to get there. Start with where you want to get to. Make sure you understand what your end objective is here and then you can work back from there as to how to create a report."

We're looking for happy people who really enjoy living in our communities, working in our communities. We're looking for reasonable returns for our investors. And those are things we're looking for in an efficient operation and at the most affordable prices we can get them, and so we back up from there and [consider] anything we can do to improve those things by changing something.

DAVID
SAYS

As I tell our people all the time, **I really want you to fail a little bit.** If we're not failing a little bit, we're not pushing the envelope enough.

TIPS FOR MAKING CHANGE



Forget how you're going to get there. Start with where you want to get to.



When we try things, it's okay to try to be early.



Sometimes change and fear occur in the same context.

ROLE MODELS FOR CHANGE



T-Mobile

NORDSTROM

redbox.

CHANGEMAKERS

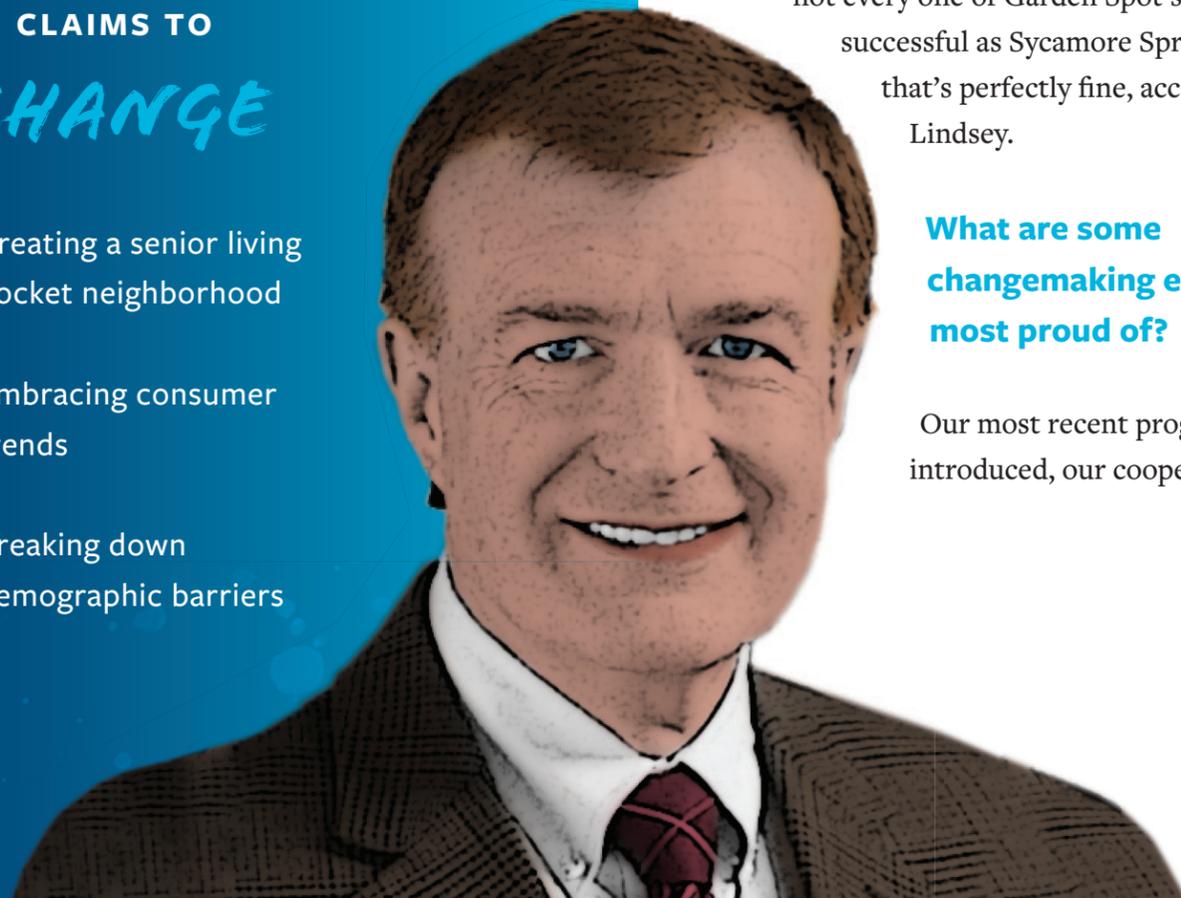
Steve Lindsey

CEO of Garden Spot Communities



CLAIMS TO CHANGE

- ✓ Creating a senior living pocket neighborhood
- ✓ Embracing consumer trends
- ✓ Breaking down demographic barriers



Garden Spot Communities CEO Steve Lindsey is shaking up the traditional continuing care retirement community (CCRC). From embracing trends like fast-casual dining to innovations like hot air balloon rides for residents, Lindsey is a Changemaker, setting an example for the whole industry from New Holland, Pennsylvania-based Garden Spot Village.

Garden Spot, a nonprofit CCRC serving more than 950 older adults, has also invested time and money in a cooperative living house as well as in Sycamore Springs, a “pocket neighborhood” consisting of 27 homes that are clustered together around a common green space. The concept has been a hit, but not every one of Garden Spot’s projects is as successful as Sycamore Springs — and that’s perfectly fine, according to Lindsey.

What are some changemaking efforts you’re most proud of?

Our most recent program that we introduced, our cooperative living

house, is an example of that. It’s a co-living experience for older adults, regardless of their level of income. They pay a month-to-month, sliding scale rent. They get to have an incredible life together, and an opportunity to avoid the isolation that oftentimes comes with aging and with aging and poverty.

What other changes would you like to see in your organization or senior living at large?

I talk about the value of that Maslow’s hierarchy model, and how that’s something that we really focus on a lot in our planning.

We think of the pinnacle of Maslow’s hierarchy being self-actualization, but actually, Maslow, a few years before he died, added another level on top of that and he called that transcendence. It’s that idea that once you become the best version of yourself, the natural expression of that is to be a part of something bigger than yourself, and to share who you’ve become out with the world. I think that’s the perfect calling for senior living.



COMPANY HEADQUARTERS

New Holland, Pennsylvania



We have people who have lived long lives, who have gained life experience and, hopefully, some wisdom. Now, there’s that opportunity not just to sit on the front porch in a rocking chair, but to become engaged with the world around you and to share that wisdom, to share that life experience out into the world, and to make a difference. To cement your legacy, and to build your legacy, even, in this season of life.

Do you thrive on change?

For better or for worse, I tend to get excited about change. I tend to challenge the status quo, to look for new opportunities and to push that out.

One of the things that I talk about is that we need to build our failure resume. We need to be willing to share that with others and talk about our failures.

The idea with failure is not just to leave it there but to fail forward. So that has become kind of one of our mantras at Garden Spot Communities, this idea of failing forward. Of doing the post-mortem, understanding why we failed, and then taking those learnings and using those to pivot and to be successful in the future.

Can you describe a time where you tried to bring change about and it didn't work?

The idea for Sycamore Springs goes back a lot of years. We got to the point where we were ready to do kind of a public introduction of the concept. So we had someone come

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I tend to challenge the status quo, to look for new opportunities, and to push that out.

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from outside the area who was instrumental in bringing co-housing to our country. He came to do kind of an introductory public presentation.

In the middle of the presentation, he put up a slide on the screen that I'd never seen him use before. It was that picture from the '60s or early '70s of the psychedelic school bus, and all of the hippies lying around on top of the school bus smoking dope. His comment to our group was, "If this was you in the '60s, you're going to love co-housing now."

Now, we're in very conservative eastern Lancaster County, Pennsylvania. Amish country. And that was not that group of people in the '60s. Frankly, for the next weeks and months, I got hate mail, I got phone

calls. The message was the same: "Who do you think you are, bringing hippies and communists to Lancaster County?"

What happened out of that was — again, this concept of failing forward — we dropped back, we stopped the project from moving forward and we spent a lot of time with the people who were in the focus groups who liked the idea, as well as the people who were really, really angry at us for even considering it.

That was what eventually became Sycamore Springs, with some tweaks and adjustments, and some additional learning. But it was that complete, epic failure that ended up turning out to be one of our great successes.

STEVE
SAYS

We need to be willing to share [our failure resumes] with others and **talk about our failures**. The idea with failure is not just to leave it there, but to fail forward.

TIPS FOR MAKING

CHANGE



Build a "failure resume."
Learn from mistakes.



Be curious.



Include many stakeholders
in the discussion.

ROLE MODELS FOR

CHANGE



Walt Disney



Roy Disney



Steve Wozniak



Steve Jobs



Bill Gates



Paul Allen

CHANGEMAKERS

Shamim Wu

COO of Eclipse Senior Living

In rising through the industry, Shamim Wu helped shape some of senior living's largest and most influential operators. As COO of Eclipse Senior Living, she is leading the charge toward creating a more diverse workforce while building a multi-brand, tech-forward operating platform, earning her the status of senior living Changemaker.

Eclipse was founded in late 2017, taking over management of about 80 former Elmcroft Senior Living properties. Today, the company manages a portfolio of about 100 communities, broken out across the Elmcroft by Eclipse and Embark by Eclipse brands.

Do you thrive on change or consider yourself more cautious by nature?

That's what I love the most about my job, that no two days are ever alike. If I were ever in an environment where change wasn't embraced, it just wouldn't work for me.

Can you describe a time when you tried to implement a change or were part of a change that didn't go well?

I took a job that looked great on paper. Everything about it checked every box I had. The people seemed nice and the product had great equity in the market. And when I got there, it felt like an organ transplant rejection.

I don't hold anyone accountable but myself. It was the biggest lesson of my career to trust my instinct, because sometimes just because things look good on paper doesn't mean they're going to translate well into reality. And I'm grateful for the opportunity because, like I said, it ultimately taught me the biggest lesson of my career that I've carried with me since, and that's to trust my instinct.

Were there specific things that you were trying to do or change, which were rejected?

When I look at my leadership style, it's very data- and analytically driven. There's a lot



COMPANY HEADQUARTERS

Lake Oswego, Oregon



of focus daily on metrics that really matter to our business. So in addition to that daily intensity, there's also a reporting component that has to come. You have to be able to give visibility and transparency into the things that you're trying to affect change with. People have to be willing to accept results and accept that visibility and embrace them to do better. And so I think that there are just key components of my leadership style that are unique and aren't for everybody.



CLAIMS TO

CHANGE

- ✓ Having a diverse team
- ✓ Creating culture
- ✓ Being a champion of work-life balance



RESUME REVIEW



What traits or skills help make you an effective Changemaker?

Flexibility and being open to the zig-zag. Realizing that no two days are ever going to be the same, and that, frankly, you don't want to create the same experience for your team year after year.

The second thing is being open to constructive feedback. I've had people courageous enough to give me honest feedback that has changed the trajectory of my career.

The third skill that I think is important during times of change is staying committed to doing what's right versus what's easy. I think people often go for the path of least resistance, whether it's avoiding a hard conversation or keeping things as they've been running, not wanting to rock the boat. But I think being able to do what's right, even when it's hard or uncomfortable, you have to be willing to do that if you want to navigate change. Sometimes it takes a long time. But if you can stick with the messy middle, it's totally worth it.

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If I were ever in an environment where change wasn't embraced, it just wouldn't work for me.

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What about getting the timing right? You need to be ahead of the curve, but you can't be too far out ahead.

I think the key component to speed is cascade of information. You can do something quickly, as long as you've cascaded it appropriately.

In our organization, we move incredibly quickly, but it's because if Kai and I make a decision on something, I'm turning around right after that call and I'm calling my team and I'm saying, "Okay guys, here's what we want to do. What do you think?" And my team is going to be the best place to say, "We need to get the team on a call right now." Or, "Let's wait until tomorrow, next week, the 15th, once we've gotten through this other milestone."

But if they decide that we're going to do this today, we then immediately turn around and get on a call with the regional leadership and say, "Here's what we're thinking. This is getting rolled out effective tomorrow by X, Y, and Z."

Then they have the next 12 hours or so, because of time zones and where communities are located and span of control, to get on a call with their team. Our organization can make a change within 24 hours as long as we've cascaded the information. Where it feels chaotic is when everybody's been communicated to except the community team and they're feeling the brunt of the change.

2010

Started as VP of sales at Holiday Retirement

2016

Became President and COO of Silverado Care

2017

Moved to Eclipse Senior Living as Chief Operating Officer

SHAMIM

SAYS

I'm now in a position where I can **create the change** that I want to see in the world.

TIPS FOR MAKING

CHANGE



Be flexible. Be open to the 'zig-zag'.



Be open to constructive feedback.



Do what's right, not just what's easy.

ROLE MODELS FOR

CHANGE



Granger Cobb



Kai Hsiao



Justin Hutchens

CHANGEMAKERS

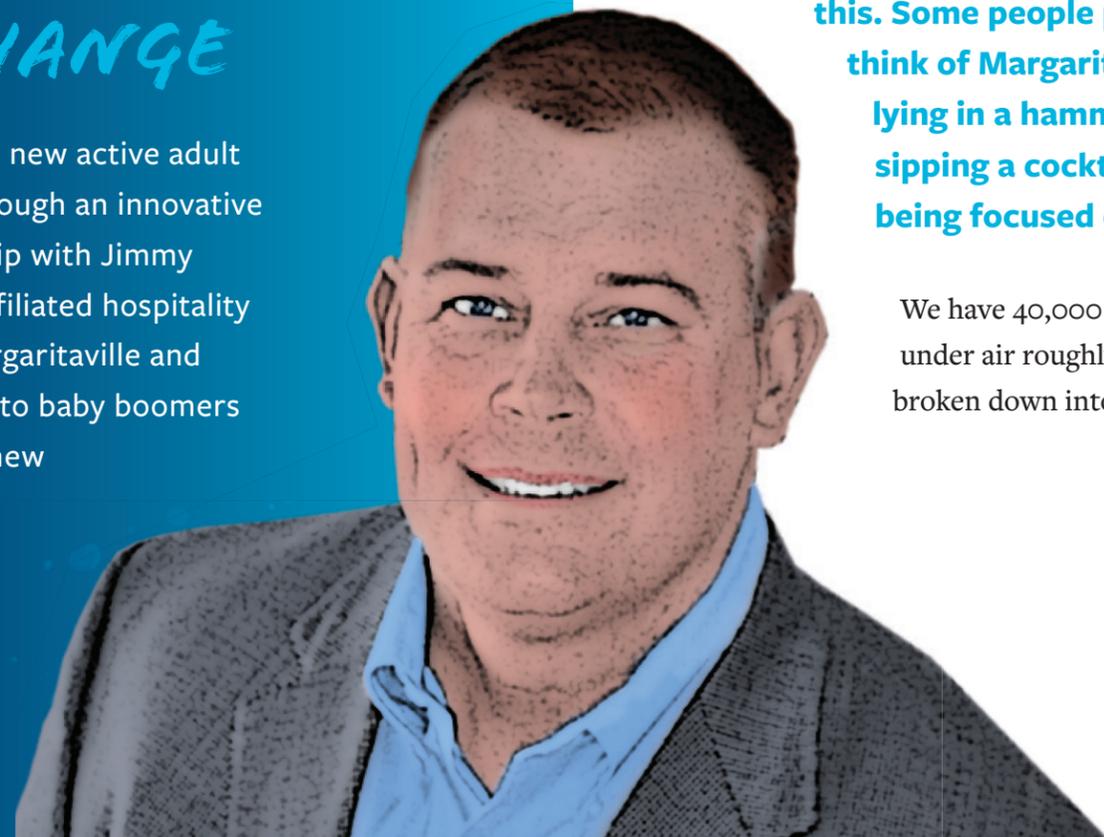
William Bullock

President of Latitude Margaritaville,
Minto Communities USA



CLAIMS TO CHANGE

Creating a new active adult model through an innovative partnership with Jimmy Buffett-affiliated hospitality brand Margaritaville and appealing to baby boomers with this new concept.



By creating a new active adult model through an innovative partnership with Jimmy Buffett-affiliated hospitality brand Margaritaville, William Bullock has earned the status of senior living Changemaker.

Bullock started his career with publicly traded home builder companies, but wanted more freedom to be creative and entrepreneurial. He found that in privately held developer and manager Minto, which he joined in 2009.

After acquiring some other active adult projects, Bullock partnered with Margaritaville to create large-scale developments offering a Jimmy Buffett-inspired lifestyle.

Explain the wellness element of this. Some people probably think of Margaritaville as lying in a hammock and sipping a cocktail, not being focused on wellness.

We have 40,000 square feet under air roughly and it's broken down into four buildings,

each one about 10,000 square feet. One is the Latitude Bar and Chill restaurant, and that's just what it sounds like. It abuts a giant resort-style Paradise Pool and that's where, when you think of the Margaritaville lifestyle sipping on a cocktail and listening to music, that happens.

But next to that, we've got our Fins Up Fitness Center. I'll come back to that because that's a huge wellness component.

The third building is the Workin' N' Playin' Center. That's where clubs and activities occur. Then the fourth is the Last Mango Theater, which is like a music hall where you can have dances and education seminars, et cetera.

This forms a quad, if you will. Each of these buildings is independent and then in the middle is a huge bandshell where we have concerts.

Because the No. 1 proximity attraction the active adult is looking for is medical, we partner with Halifax Medical in Daytona. We actually, in our fitness center, created



COMPANY HEADQUARTERS

Coconut Creek, Florida



space for them to put personnel. So, as a resident, not only will you do your own fitness activities, but you'll be able to engage with Halifax personnel on fitness regimens [and] dietary needs. They're going to come in and talk about a healthy house and the type of things you do and don't want to bring into your home. In the Last Mango Theater, we can do dances or educational seminars, and we will do large scale demonstrations and programs on wellness and nutrition.

So, you can work out in the community, you can get consultation in the community, you can do a one-on-one, we can do it in a group setting. Shortly, within hopefully two years as the medical community advances the concept, we'll have high-res teleconferencing abilities where you'll be able to actually get a doctor consultation from within the community at the fitness center to a doctor back at the hospital.

Then, we've got miles of walking trails to the community. We've got pickleball, we've got tennis. So all the active components of lifestyle and wellness and nutrition, they're all built into the community down to our partnership with Halifax. If this is level one, what we're proposing to do at Watersound, it will be level 10.

I can't disclose exactly what that is because we're still planning it out, but I would say our intent is to have one of these premiere aging-in-place research and education centers in the U.S. at Latitude Watersound in the Panhandle.

What role do you see for more traditional assisted living in or around a Latitude project?

I think you go back to Sun City Center Tampa. There are a host of assisted and congregate living facilities in that Sun City Center campus site. I think they maxed out at about 17,000 residents of build out.



I'm entrepreneurial and definitely always looking at our product.



We have the license for all 48 states in the continental U.S. to be this exclusive Latitude provider, and we're going to take Latitude outside of the Southeast. So the ability to partner with assisted living and congregate living facility providers is definitely something we're focused on. We don't believe in [that at] the inception of a community, but we definitely believe they have a need and a position in the community when the time is appropriate. That may be five, six years down the road.

The Jimmy Buffett brand of sun and surf and fun naturally fits coastal areas, but what about other markets?

We call it brand portability. One of Margaritaville's most successful hotels is in

Pigeon Forge [in Tennessee], which is in the mountains. That would be the last place you'd think you'd take the sand and the beach, but it works up there.

What's cool about the Margaritaville brand is music, so any music hubs, Nashville, Austin, those are already likely candidates. Again, the opportunity to expand those is all predicated on market timing and finding the right partner or piece of land that the numbers work.

We've got over 250,000 people in our database who've expressed interest in Latitude. We're constantly asking, "Where would you like to have the next Latitude?" Not only do you inherently think about food, fun, music and sand and where you want to put them, it's all validated by their response.

WILLIAM
SAYS

It's **not** all about me.

TIPS FOR MAKING

CHANGE



Innovation breeds more opportunity for all.



It's amazing what [the] active adult crowd will do for you if you listen. They'll show you how to be successful.

ROLE MODELS FOR

CHANGE

Del Webb®
Active Adult Communities

The Villages®

CHANGEMAKERS

Patricia Will

Co-Founder & CEO of Belmont Village Senior Living

CLAIMS TO

CHANGE

- ✓ Developing early-stage dementia interventions, forging university affiliations
- ✓ Establishing a first-of-its-kind health system partnership
- ✓ Pursuing ambitious international development plans



Over a career spanning about two decades, Belmont Village co-founder and CEO Patricia Will has earned the status of senior living Changemaker.

From mixing levels of care within a single building to developing early-stage dementia interventions to forging university affiliations, Will has led the way. Today, she continues to push the envelope with a first-of-its-kind partnership with health system Baptist Health, to co-develop senior living communities. She also is pursuing ambitious international development plans, and a new approach to unit design.

Houston-based Belmont Village now has a portfolio of about 30 buildings but maintains the spirit of a startup, Will said in her Changemakers interview. Still, having a more mature business infrastructure allows her to take on even bolder projects.

What are some changemaking efforts you're most proud of, within Belmont Village or the industry as a whole?

The first is a simple one, which is including independent living, assisted living and memory care under one roof, in one building that's fully licensed.

We did that in an effort to accommodate couples, and in an effort to fight ageism. There's a notion that people would object, in independent living, to seeing walkers or wheelchairs, and we decided to say that we have capable people who have different needs, and we don't want to segregate them. That's something that we did for the very first time on our first building in California, in San Diego, and we've now replicated in many parts of the country, although it's still not done enough. We've integrated dining rooms, integrated gyms, integrated social areas and even integrated floors.

BELMONT *Village*
SENIOR LIVING

COMPANY
HEADQUARTERS

Houston, Texas



Can you take us back to that moment when that was still a new idea, to integrate in that way?

Everyone in the industry at the time said, "You're crazy. The independent seniors will not come to live here. They don't want to see frailty in the dining room [or] in the common areas."

RESUME REVIEW



And we said: “Wait a minute, who is the senior here?” And the senior is 85 [years old] regardless. The issue is whether or not they’re experiencing physical or cognitive frailty. And as a couple, what are you going to do? Tell one to go live one place and one to go live in the other place?

So we said, “This is a big bet, but we’re going to integrate service, and license the whole building so that the senior in independent living who needs medication management can get it or can get assisted living services post-hospital stay and eventually in their unit.” That was now 18 years ago. The building [in San Diego] has done incredibly well. We’ve used the same algorithm over and over, including in all of the projects that we’ve done in affiliation with universities.

We even pushed it further, and in our mid-rise buildings and high-rise buildings, many of them share floors, share elevators, share common area spaces, and I think it exemplifies what we’re after, which is a contra to ageism that typecasts individuals because they appear to be frail.

That integrated model is now well-established in the industry, but you think it’s still not done enough?

No, it’s not done enough.

You still see a lot of communities where if you need assisted living, you need to move to that other building, to that inferior space, to that place where nobody wants to go. That’s unfortunate.

Other changes you would highlight?

This would probably be my second proudest moment: recognizing the need for highly developed programming and curricula for those who are in assisted living — or independent living, by the way — who are beginning to experience mild cognitive impairment. The research tells you that if you hit on five or six cylinders in a very deliberate way with highly trained people and you measure the outcomes, and we do, that you can change the trajectory of memory loss.

We took a look at that and said, “Wow. I wonder how many people living in assisted and independent living with us could benefit from such a deliberate curriculum?” The answer was: a lot.

So starting in about 2007, we began working on this intensively, and developed programming for those who don’t need to live in secured dementia [housing]. At first, it was five days a week, and then seven days a week, and now seven days a week and into the evening.

The program has been studied by Vanderbilt University. What we’ve learned is that, one, residents who experience mild cognitive impairment can thrive within assisted living, and also that it’s possible, as I said, to change the trajectory of the disease process. That’s a mind-bending accomplishment, particularly for a disease process that still has no medicinal cure.

TIPS FOR MAKING CHANGE



It takes vision and persistence, and a willingness to step outside the box.



Maintain patience and long-term point of view.



Understand that you’re going to make mistakes or something won’t work and [you can] say, “OK, never mind. Let’s try something else.”

2013

Belmont Village starts building first international community in Mexico City

2019

Belmont Village forms joint-venture partnership with Baptist Health South Florida



PATRICIA

SAYS

With the big age wave in front of us I believe that the current rate of change is fine. That said, **the next 10 years must be transformative.**

CHANGEMAKERS

David Inns

CEO of GreatCall

CLAIMS TO

CHANGE

- ✓ Bringing senior tech into Best Buy
- ✓ Lowering health care costs in senior living
- ✓ Creating a winning tech-plus-services model



Perhaps nothing is transforming senior living more than technology, and few tech companies in the space have matched the success and impact of GreatCall, which changemaking CEO David Inns has led since 2006.

After being acquired by Best Buy for \$800 million last year, San Diego-based GreatCall is in a new league. Its products that are custom-designed for seniors — including the Jitterbug smartphone and Lively emergency response tech — are being sold in Best Buy stores nationwide, and Best Buy's Geek Squad tech support teams are available for installation and troubleshooting. Approximately 1 million people subscribe to GreatCall services, and the company has annual revenue of more than \$300 million.

Inns envisions a future in which GreatCall is an integral part of senior living efforts to manage population health by reducing spending and improving outcomes — and earning financial rewards for doing so.

RESUME REVIEW

How has tech evolved since the days of “I’ve fallen and I can’t get up” emergency pendants?

When you look at our products now, right, we have everything from a smartphone to wearables to smart home sensors that are able to detect changes in peoples' wellbeing. So, we do see ourselves on the forefront of pushing the boundaries of where technology can go for senior care.

But I think the thing that has made us the most successful, and maybe what has helped us to be a leader in this space, is balance.

I had people five years ago saying, “Five years from now, all seniors are going to be using smartphones,” [yet] even today, in the 75-plus age group, only 30% of seniors have smartphones.

You can go too far the other way and say, “Seniors are never going to adopt new technologies and we should just be focused on red buttons that you wear on your chest.”



COMPANY HEADQUARTERS

San Diego, California



I think there's a happy medium that we've ridden, of saying, “Let's understand our customers, let's understand their limitations, let's understand their fears, let's work with them and provide a level of service where we can help them adopt new technologies, we can get them more comfortable with engaging with it, without pushing the envelope so far that we block them.”



How do you strike that balance?

I'm not big on gut feels.

We use a lot of what's called Lean development methodology, and that [includes] research, focus groups. So what we do a lot of is interviewing. Running concepts by people, really getting their true emotional reactions to concepts, new products, new technologies, and trying to draw out those emotions, their fears about it, their willingness to adopt, and having discussions about it.

How are the efforts to integrate with Best Buy?

We're just really ecstatic with the relationship and where we are from an integration perspective.

We're part of a division within Best Buy called Best Buy Health, which is focused on a similar mission of enabling seniors to live in their homes longer, on their own terms. We now

have Geek Squad doing all of our installations of our products and technology in the homes of seniors, or in senior living, if necessary. So that's been a huge capability that we never had before.

We are working together to develop an even more robust road map where we can accelerate product development, we can accelerate growth by getting into all of their stores on a larger scale.

Do you think the senior living industry is embracing changes in technology?

It's probably not a surprise to you, but I think change in the senior living industry has been slow.

The discussion around technology and connected health has generated excitement around improving remote care and health outcomes. An overlooked area where there is significant opportunity for growth and change is connected health for seniors, especially in senior living communities.

Whether it's peace of mind for family members or 24/7 support for a resident, senior living communities are beginning to see the significant benefits of a service such as GreatCall. We see varying visions for connected health, ranging from Holiday Retirement, a client of ours who understands the merits of advanced technology, to others who are gaining understanding as the discussions around technology educate on impactful change.

I'm a big believer in that the senior living industry has an opportunity to increase its role in managing the risk of seniors and capturing a portion of that health care value chain by ... managing that risk.

I think that's where we can help. By using technology, we can help the senior living facilities reduce the health care costs of the people who are in their care. That earns the senior living group the right to some of the health care risk value chain, which is a very significant monetary opportunity, in my opinion.

DAVID
SAYS

We do see ourselves on the **forefront** of ... where technology can go for senior care.

TIPS FOR MAKING

CHANGE



Don't let gut feelings drive big decisions.



Keep taking care of yourself in times of stress.



Deeply understand your customers.

SENIOR LIVING TECH

OPPORTUNITIES

- Improving outcomes via predictive analytics
- Care coordination
- Leveraging mass-market tech products

2014

GreatCall adopts Lean business methodology

2018

GreatCall is acquired by Best Buy for \$800M

CHANGEMAKERS

Gregory Smith

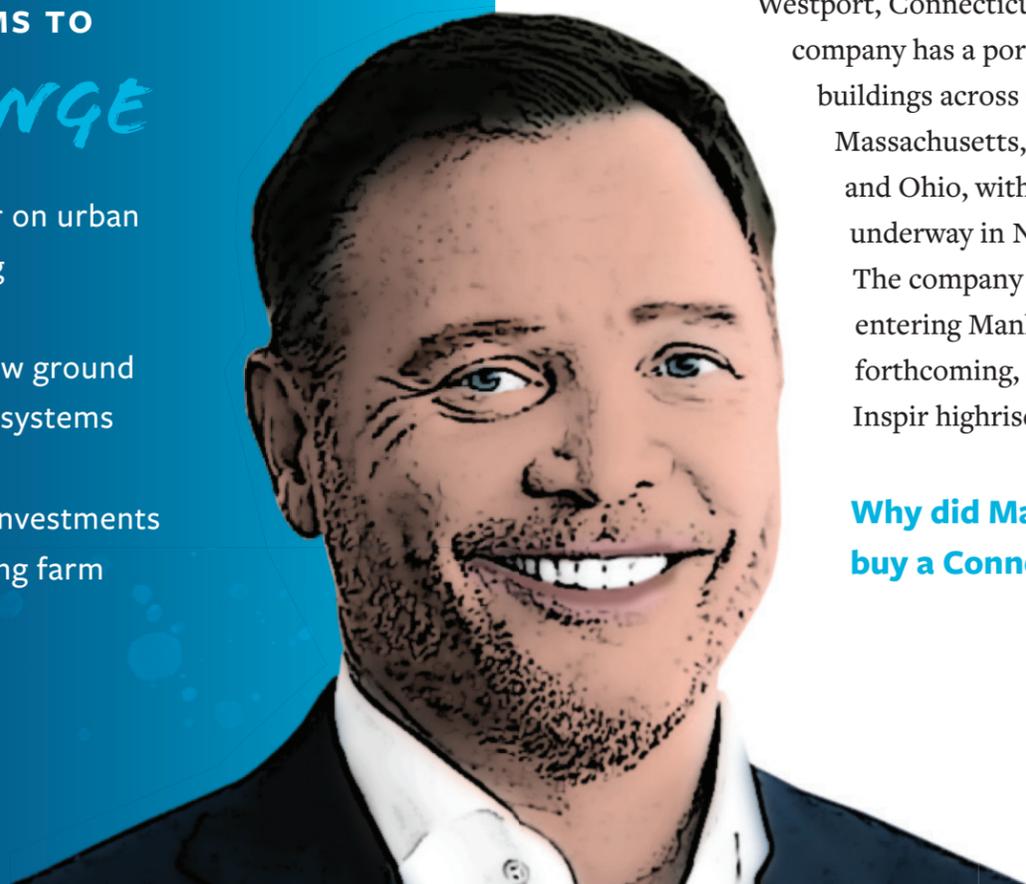
Founder, President and CEO of
Maplewood Senior Living



CLAIMS TO

CHANGE

- ✓ Early mover on urban senior living
- ✓ Breaking new ground with health systems
- ✓ Innovative investments like a working farm



Maplewood Senior Living is now a well-established provider, but founder and CEO Gregory Smith has earned Changemaker status by keeping an entrepreneurial spirit alive.

From creating a new urban senior living brand, to co-locating assisted living with medical office, to adding a working farm to the company's portfolio, Smith has made Maplewood into an industry trendsetter.

He began Maplewood as a development company in 2004, to diversify his existing business in hotel and office real estate and management. His grandmother and great-aunt moved into that first assisted living community, making the business personal, and Maplewood soon began operating

its senior living properties. Today, the Westport, Connecticut-based company has a portfolio of 14 buildings across Connecticut, Massachusetts, New York and Ohio, with development underway in New Jersey. The company is also entering Manhattan with its forthcoming, \$300 million Inspirighrise.

Why did Maplewood buy a Connecticut farm?

We bought our farm about four years ago. We've taken the steps to bring on a farmer who's been farming our land for the last three years and providing produce at this time to our communities in the Connecticut market.

This takes time, energy, resources, capital, and we've invested millions into it already. We've been working in the past with the University of Connecticut's agricultural department, looking at architects on the design of the farm. What can we grow on the farm, what can we have for livestock on the farm? We have an acre-and-a-half irrigation pond that we built. All of these things are creating this environment of not only sustainability but cultural engagement for our residents.

This is probably a five- to seven-year process. But in the meantime, we are providing probably 16 to 20 different types of produce to all of our communities in the Connecticut market.

We're thoughtfully designing and building something that's truly unique, that fits the mold of who we are as an organization. And, taking it at that point and saying, [can we] replicate it in other markets.

Describe Maplewood's involvement in a \$100 million development to include assisted living, medical office and health/fitness centers.



COMPANY HEADQUARTERS

Westport, Connecticut



My brother is the CEO of our Maplewood health care division, overseeing all aspects of medical office. And so between him, myself and Western Connecticut Health Network, which is now a seven-hospital system called Nuvance, we came up with the concept of integrating assisted living into this medical care model of having, not just primary care, but every sub-specialty you could think about. A surgical center, urgent care, radiology, ophthalmology — all of these things embedded in this one building where our residents would have access to health care at their fingertips.

You're talking about a 160,000-square-foot medical facility that's incorporating a number of specialties, and looking at this as an opportunity from a research perspective as well. It's all about wellness. I think this is going to be one of those fundamental shifts going forward, where you're going to be seeing not only partnerships with regards to the continuum of care but the migrating to a more physically integrated type of model than we've seen in the past.

How did the \$300 million Inspir-branded Manhattan highrise project come about?

This has been a labor of love and something we've been thinking about for the past five or six years.

Our feeling was, there's no reason why you can't have senior housing embedded in urban infill markets. I think that there is a shift toward senior housing being there ... but it's not about just building in these markets



I always want to keep my eye on the road and not look in the rear-view mirror.



and putting a shingle on the door and saying you're open for business. It's about being thoughtful and innovative in your design and your programming and every initiative you do. It's somewhat of a different clientele. Expectations are changing across the board. It's not just expectations in these urban markets, it's in suburban markets as well. But for us it's been, with Inspir, primarily getting in front of what those expectations are and what those trends are.

It's creating innovative, unique environments that create experiences that are exceptional for our residents every single day. And it's not just through architecture and design, but

about technologies, access to health care, being creative in what you're doing with your care models.

Is senior living changing fast enough today?

Change, in my opinion, by definition results from expectations. And what I mean by that is the expectations of our consumers, our residents, our families. They're constantly changing. As an industry, I think we're doing a better job to address it.

I don't think we're doing enough yet.

**GREGORY
SAYS**

**Expectations are changing
across the board.**

TIPS FOR MAKING CHANGE



**Build and collaborate with
a strong team.**



Be observant.



**Shape consumer
expectations.**

CHANGE BY THE NUMBERS

- 16-20 kinds of produce provided by Maplewood's farm
- \$5 billion potential pipeline of Inspir urban communities
- \$100 million project with Nuvance hospital system

CHANGEMAKERS

Lynne Katzmann

Founder, President and CEO of Juniper Communities

CLAIMS TO

CHANGE

- ✓ Created influential Connect4Life model
- ✓ Medicare Advantage trailblazer
- ✓ Eco-friendly building pioneer



Juniper Communities Founder and CEO Lynne Katzmann has combined a background in public policy with entrepreneurial acumen to become a senior living Changemaker, creating an influential operating model and leading the industry in new directions.

When she founded Juniper in 1988, Katzmann had a goal to shape public policy through her work at the company. Today, she is succeeding. Juniper's Connect4Life model — developed in response to the Affordable Care Act — has become a template for how senior living can benefit from and contribute to changes in the U.S. health care system.

Connect4Life positioned Juniper well for further policy shifts, including new Medicare Advantage flexibilities that could make this insurance product a senior living payment source. Katzmann has teamed up with other senior living providers to create The Perennial Consortium, which is in the process of bringing its own Medicare Advantage plans to market.

Juniper currently has a portfolio of 21 communities in four states.

How has Juniper achieved its good results from Connect4Life?

We had Anne [Tumlinson] do the research, and she first looked at utilization. The results far exceeded anything we ever thought possible. With the very large reduction in hospitalizations and readmissions, we said, "Okay, we've got a program that really could be something. And what we've done is doable by anyone in our industry, and because we believe in being a model for public policy, let's package it and share it."

We then hired Anne again to monetize the value of the savings from [our reduced utilization], and those numbers came back so amazingly large that we said, "If we're saving the government \$10 billion to \$15 billion a year, wouldn't it be cool if senior housing captured some of those dollars so we could do more for the people who need our services but can't afford to pay for it?"

Do you think the industry is changing quickly enough?

It has no choice.



COMPANY HEADQUARTERS

Bloomfield, New Jersey



Our consumer is changing at every level. The Greatest Generation took what we had, the Silent Generation isn't so sure, [but] will take it when they absolutely need it. The boomers will not. And so when you're faced with consumers who don't want to buy what you offer, you have to change.

Technology, it's here. And I believe people know that technology is here to stay, whether it's Alexa, or a sensor, or ambient technology that picks up data, or AI, or any of those — data is here. It is the new way we look at our world and communicate within our world.

RESUME REVIEW



1988

Katzmann founds Juniper Communities

1994

Under Katzmann's leadership, Juniper begins expanding its portfolio from skilled nursing to assisted living

I think that the combination of several of those factors, consumer change being one, technology being another, the labor force changing being another, I think all of those things say we cannot face the world in the same way we did before.

Now, what pace you take and what constraints you work under are all different.

I really believe that if people don't get off the mark soon, we're going to be disrupted by Apple or Amazon. What Amazon's doing with Berkshire Hathaway and JPMorgan Chase is, they're putting together their own model for health care of the future. Atul Gawande has better words than I do, but [believes the] same thing: Bring [health care] down to the lowest level, maintain your lifestyle, manage your lifestyle and don't use all the expensive stuff. He talks about end of life. He is the head of [Amazon's effort], and they put all their money behind him. So, it's happening.

[Clayton Christensen says] an industry is ripe for disruptive innovation when things become too expensive and inaccessible for

Change is what makes a vibrant life, what keeps me invested, what makes me happy, what keeps me willing to be on a plane three-quarters of my time.

the common person, and we're just about there. We're certainly there in health care in general, and we're quickly moving there in our industry.

He said that those preconditions make it right for people to either come in in a big way and disrupt, or to reorganize the pieces of the puzzle — my words, not his — to create a new model which serves more people at a cheaper cost. That's what Connect4Life does.

Do you have a vision for what will appeal to the boomers?

[If the question is], "What do you see happening for senior housing in the future?" in my mind, it is integration. But it's not just integration of health care and housing. It's far more than that.

You have to integrate technology with human touch. High-tech, high-touch. You need to think about how to integrate lifestyle management services with housing, and also with care management.

Lastly, in terms of an experience in programming, you need to integrate your community with the greater community surrounding it, so that when people come to your building, it's not a segregated environment, but rather an integrated environment made up of people of different ages, with different interests, doing different things in your site.

When you talk about it, it doesn't sound like much, but when you think about what it takes to truly accomplish that, it's a shifting of the paradigm of how we do things.

TIPS FOR MAKING CHANGE



Win your team's trust.



Seek new ways to connect "puzzle pieces" of existing ideas.



Publicly share success stories.

JUNIPER'S CONNECT4LIFE PROGRAM

- Integrated tech platforms
- High-touch concierge services
- Coordinated health care
- Reduces hospital use
- Increases length of stay

2011

2012

Juniper implements an EHR solution as the foundation for an integrated electronic operating model

Juniper launches its signature Connect4Life program

LYNNE

SAYS

We cannot face the world in the same way we did before.



Who We Are

Established in 1984, Yardi® develops and supports industry-leading investment and property management software for all types and sizes of real estate companies. The Yardi® Senior Living Suite eliminates the gap between senior living property management and clinical services by managing resident care, marketing, leasing, CRM, finance and operations on a web-based software platform hosted by Yardi in the cloud.

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 SENIOR HOUSING NEWS

**CHANGE
MAKERS**