

**2018 MID-YEAR
MEETING**

[left to right]

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Living Marketing Solutions

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GlynnDevins Senior Living
Marketing Solutions



The dairy industry asks, Got Milk?
Recreational vehicles evoke
adventure with Go RVing. And
financial planners wisely advise
to Start Planning for Your Future.

TABLE OF **CONTENTS**

2
**Senior Living Weighs the Potential
for Expanding Awareness, Changing
Perceptions, Increasing Demand**

14
**Senior Living Industry
Promotion Campaign:
Reactions, Questions, Suggestions**

26
**Safety and Security in
Senior Living Communities**

32
**Improving Leadership
Through Self-Assessment,
Awareness and Motivation**

Cover Photo (left):
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Cover Photo (right):
Scott McCurdy, Coastal Reconstruction Group; Evrett Benton, Stellar Senior Living, LLC

Senior Living Weighs the Potential for Expanding Awareness, Changing Perceptions, Increasing Demand

These are some of the more memorable and compelling category promotion campaigns that heightened awareness and changed perceptions with the goal of increasing demand.

Is senior living ready to join the ranks of industries that elevate their businesses by mounting national multi-media promotional campaigns?

GlynnDevins' Sue McClure, CEO, and Molly White, Vice President, Brand Strategy, who partner with the American Seniors Housing Association in advancing the Where You Live Matters consumer education initiative, presented an in-depth analysis of

a senior living campaign's potential opportunities and challenges in the quest to expand market penetration.

McClure led off by reviewing the Got Milk?, Go RVing and Certified Financial Planner campaigns and their results.

The California Dairy Board's advertising in the late '80s and early '90s produced little in the way of

results, with a significant decline in milk consumption during that period. So they partnered with the California Milk Producers Board and worked with the California State Food and Agriculture Department to fund a program promoting milk consumption.

They worked together on a government check-off program,

which is common in agricultural and commodities marketing and is tied to tax returns when sales figure and revenues and units of sales are reported. This funded the group. Decision-making was the responsibility of the California Milk Producers Board.

Money for the preliminary campaign came from a three cent per

KEY CAMPAIGN FACTORS INCLUDE:

- Market research defining the situation and problems
- Determining how goals and objectives will make an impact
- Developing strategy that entails messaging, target audience and measurement
- Planning an approach for media, budget and timing
- Execution
- Evaluation

gallon contribution from all milk processors. Early on, the spend was around \$13 million in California only. As the Got Milk? campaign emerged, it grew to \$23 million for testing to determine whether full-scale television and print exposure would increase consumption.

After five years, the campaign hit an \$80 million spend, and by 2003 the campaign had a 93 percent awareness rate in California. However, milk consumption continued to decline during that period and has continued to decline through today.

“One of the things we learned from this is

even though they did a quick pilot in California and saw some slight increases, after that period when they continued to see declines, they did very little to change the campaign,” McClure reported.

“They stuck with the celebrity promotion campaign for a decade, but they were not thinking about the true competition and a value proposition that differentiated them from soft drinks and health drinks. Despite the heavy spend, it did not change the course throughout those decades,” she observed.

Go RVing with taglines such as Go RVing,

Life’s a Trip, and What Will You Discover has had a successful run since 1997 after starting with print advertising and moving into digital, television and marketing events.

A coalition was formed with RV manufacturers, RV campgrounds, national parks and others with a stake in the industry to fund the campaign. The target audience was an adventure seeker, so research examined where do adventure seekers go, how do they plan their vacations, and what is top-of-mind when they think about a vacation with family and friends.

The first phase of the campaign started with a \$5 million spend and escalated over a three-year period to \$15 million. It was funded through a \$22 assessment per RV or unit built. This assessment grew over time, because annual sales grew. Over a 10-year period, sales nearly doubled from 270,000 units in 1997 to 505,000 in 2017.

HUGE ECONOMIC IMPACT

“The average cost of a RV trailer is \$70,000, so this was a huge economic impact relative to some of the other campaigns out there. It was a relatively modest spend in terms of



Kevin Murray
KEYBANK REAL ESTATE CAPITAL



that return," McClure commented. "They were also able to grow impressions and increase people's top-of-mind awareness of the possibility of a RV trip.

"There was an emphasis on tracking, measuring and adapting along the way. They added a lot of digital and event marketing to their efforts when they saw that those were getting great traction. They had a very specific and clear target, and they worked together as a coalition to fund it.

"If I think about the milk campaign in contrast to the Go RVing campaign, milk is a well-known product. People know

about its qualities. They know when they want to drink it or not, so milk is something that's very familiar to people. Go RVing had a lot less familiarity. People didn't think, oh, I would love to go on a vacation and rent a RV, or I'd love to buy a RV and use that as a vacation. It started from a lower awareness state. They were able to move the needle quite a bit," she noted.

The financial planners campaign was funded through a certification program. A clear value proposition and point of differentiation were the focus from the outset. The certification fee was

\$180,000 per year, and \$145,000 of that funded the campaign.

In the first five months, they conducted 6,000 in-person interviews with the target audience. Rather than starting with a pilot campaign, they spent \$75 million in eight months on a national program.

"This campaign was also very, very successful. Four months after launch, they saw an eight percent increase in total awareness, and a two percent increase in unaided awareness. Both were above the goals that they had set for that first year," she said. "At the end of the

first full year, unaided awareness had also increased seven percent. That was three points over the goal that they had set for themselves.

"With the measures on this campaign, they felt it was a success and allowed them to continue to fund it. It's still out there today. The renewal rates among the financial planners for the certification program were very high at 97 percent, so the funding mechanism was tied to the success of the program and the participants' willingness to be involved.

"The big takeaway here is they spent the time



Doug Schiffer
ALLEGRO SENIOR LIVING

David Sharp
MIDCAP FINANCIAL SERVICES

Bob Karn
ALLEGRO SENIOR LIVING

Larry Schiffer
ALLEGRO SENIOR LIVING



COPY FOR INDEPENDENT LIVING PROMOTION:

More than ever before,
senior living is
seniors living.

Only 25% of our longevity is determined by genetics. The other 75% is life style. That means where we age, where we live is vitally important. Belonging, engaging, and immersing ourselves in community not only safeguards against isolation, but also, quite simply, makes more life possible.

COPY FOR ASSISTED LIVING FOR SENIORS PROMOTION:

I Reached Out.

"I've always been curious about the world around me. And with a little extra help each day, I can keep exploring it — and see it with a whole new perspective."

Assisted living supports your independence every day and gives you the freedom to focus on what really matters.

**REACH OUT FOR MORE.
REACH OUT FOR ASSISTED LIVING.**

COPY FOR ASSISTED LIVING FOR ADULT CHILDREN PROMOTION:

Be Her Daughter Again.

What if you didn't have to worry about Mom taking her medications or be the one who helps her bathe or get dressed?
What if instead of caregiver you could just be daughter?

Help is not a four-letter word. In fact, sometimes the best way to take care of a person you love is to let someone help.

Assisted living is help for her, and for you.

to research and think about that value proposition and make sure they really nailed it and came out very strong with the approach they were going to take," she added.

Key elements driving the success of the RV and financial planner campaigns were identifying specific problems, goals and targets. Research was very important, along with tracking, monitoring and measuring effectiveness.

"The length of the campaigns is important," McClure stressed, "because when you're making an investment in a campaign like this in terms of changing perceptions, a lot of times you'll see perceptual measures come down if there's not a continuation or reinforcement of a message."

"The campaigns that adapted their strategy, media and messaging and were the most open to change tended to do the best with their results," she said.

To fund a senior living campaign, McClure suggested that a coalition of organizations — similar to

those participating in GoRVing — could back a program, or there might be an assessment through a portion of ASHA's membership fees. Taking a cue from restaurants, another approach would be a week-long series of promotional events sponsored by properties in local markets.

What would it take to plan, launch, oversee and evaluate a promotional campaign for senior living? White took a closer look.

TARGETING MISPERCEPTIONS

"We all think we know what the misperceptions are in senior living, but research will identify those top-of-mind misperceptions that we want to go after. That will lead to developing goals and objectives for the campaign. The next step will be the strategy and messaging, so we can target who we're talking to and what we want to accomplish," she said.

"Strategy lays the ground work for approach, media, budget, timing and then execution. That's when you finally develop the creative materials and messag-

ing and actually run the campaign," she noted. "Constant evaluation will be crucial to a campaign like this. We'll watch and adapt the campaign as needed, which circles right back into problem, situation and strategy again."

GlynnDevins created three potential campaigns that revolve around independent living with seniors as the target audience, assisted living with seniors as the target audience, and assisted living with the adult child as the target audience.

Three distinct campaigns were created, rather than one overarching promotion for all senior living service lines and audiences, because "blending messages could dilute the effectiveness of the campaign. Each audience individually has different perceptions, different needs, and different drivers," White emphasized.

The independent living campaign focuses on the perception that this is grandma's nursing home, and it only offers care in institutional facilities. The target



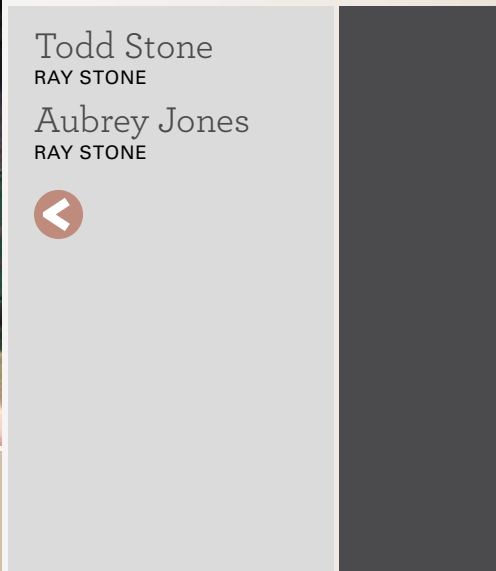
Dave Boitano
VENTAS
Manisha Bathija
VENTAS



Jeff Fischer
MBK SENIOR LIVING



Todd Stone
RAY STONE
Aubrey Jones
RAY STONE



audience is those age 70+ with the ability to afford independent living. These are close-minded naysayers who aren't considering a senior living option of any kind. Their only senior living exposure is a parent or grandparent who was in a skilled nursing facility.

The goal is to document authentic, personal stories that capture seniors who define what it means to be part of a senior living community.

The Where You Live Matters brand is prominent in all three independent living and assisted living campaigns. "That's where the tie-in comes in," White pointed out. "The Where You Live Matters logo will be the consistent mark on all the ads.

"There would be leverage. When you drive people to the website, they would be tied directly to the campaign, but it would also connect to the content in Where You Live Matters. It should provide lift for this new campaign, as well as for the existing Where You Live Matters efforts," she said.

A Grassroots Response to Launching a Campaign

Breakout groups following the industry promotion presentation and panel discussion gave the ASHA Mid-Year Meeting attendees an opportunity to interact and take a closer look at the potential value and foreseeable obstacles associated with a senior living industry promotion campaign.

CONVERSATION HIGHLIGHTS:

"When we're looking at the Got Milk versus GoRVing campaigns, this is a lot more in line with GoRVing. Got Milk was not successful. When we're talking about awareness, everybody already knew they could drink milk, and nobody ever had trouble envisioning themselves drinking a glass of milk. But people didn't think that they could go RVing. RVing had a very narrow market, and the campaign increased that. We see the similarity with this."

"This campaign has a lot of emotion to it, so we talked about reducing fear and guilt, which is the big challenge for us. The biggest competitor is the house. People are staying at home because they're fearful of a community, they're fearful to leave their homes, and the adult children feel guilty putting mom somewhere else. This campaign would reduce a lot of fear and guilt and increase trust."

"This concept for a campaign is incredibly creative and uplifting. The messaging tackles all the stereotypes and misconceptions. But when you think about how Where You Live Matters already does much of this, can we afford to spend another \$15 million? We should look at

increasing our support for Where You Live Matters to build on its success.”

“If I have one community, how much should I contribute compared to someone with a thousand communities? How do we determine who contributes how much?”

“A national campaign takes attention away from the local markets. So if I’m in my local market and I’m also contributing to a national campaign, is that reducing the resources I could apply to my local market?”

“As far as funding, maybe ASHA could step up and provide some seed money. Combining with other organizations to jointly sponsor this campaign might make sense. We thought we should only go to markets where ASHA, and maybe Argentum or LeadingAge, have a concentration of properties, so they’d be willing to participate potentially in those markets.”

“The question is if you need \$10 million, how do you raise it? We decided that the most important thing is to not go to each provider and give a provider a chance to say no. The way to do that is to go to the industry associations and ask them to find a way to pay for their share. For different category sponsors, there might be some benefits to being the exclusive sponsor, because they’d benefit enormously from senior living.”

“Why do we want to break this up and compartmentalize it by assisted living and independent living? We are talking about senior living with a big budget of \$15.2 million. If we were to try to promote the image of senior living, we should go to only two markets that are very similar to see if we get the same results in two markets. If we don’t, why was one market better than the other market? We should not try to bifurcate this industry at all. We’re seniors housing. We have enough issues trying to explain the difference between seniors housing and what nursing is.”

“There is no call to action currently in the campaign. The referral agencies have been successful, because they have a strong call to action with an 800 number. They also have a very easy-to-use contact form. If you’re driving awareness, should we also try to capture or engage further? Let’s say we test an 800 support line that literally is staffed by ASHA. Give consum-

ers a non-threatening way to reach out, engage and get more information from a service that’s completely transparent, non-biased and truly understands the value that senior living brings to the consumer. Once you do that, one of the ways to fund the campaign would be to actually monetize that value with leads and move-ins. A lead can be worth anywhere from \$45 to \$100. It’s up to the industry to decide what a lead is worth, what a move-in is worth. If this campaign were to generate money and funnel that back into the campaign, that would continue to build on itself.”

“The risk we identified was if you simply have an awareness campaign for senior living, when people need help and want to reach out through an 800 number or through a contact form, we all know that it’s the third-party referral agencies that are going to capture that lead. So in essence, we’re generating more awareness, but we’re actually driving more leads to the third-party referral agencies when the goal should be to take back the consumer and own that lead at the very, very top of the funnel.”

“We don’t think occupancy is the way to measure it, especially when we hear comments that it takes 18 months for a move-in at a CCRC. The sales period is long, and on the initial pilot, occupancy probably wouldn’t work. Do we see a discernible increase in lead generation?”

“This, in a way, prequalifies the leads it would bring in. It’s talking about social engagement and being connected to a community. If you’re bringing leads in and creating that perception for them already, it’s helping to get through that first step. They’re coming in for the social engagement, not for the level of care we would provide for them.”

“Sell the campaign as a conversion tool. Leads are not the issue, which is a little different than what some of the other groups talked about. There are plenty of leads out there. It’s all about conversion. Market dynamics could skew the measurement of the campaign’s impact. In a particular market, if there was additional inventory added during the pilot or there was some unique characteristic in that market that could skew the measurement, it could fall outside the traditional measurement parameters.” ■

The assisted living campaign for seniors is aimed at those who want to stay in their houses and wait until there is a serious medical need. The goal is to overcome low occupancy in assisted living and offset increased independent living acuity.

The target audience is seniors age 80+ with \$35,000 annual income or more living in houses. They fear loss of independence and privacy, and the onset of decline. They are in denial and believe they can maintain the status quo.

Seniors need to know that assisted living is so much more than care. It provides the support they need to stay in control and offers a lifestyle that keeps them joyfully connected to the life and people they love. All they have to do is reach out for it.

“These assisted living ads aren’t focusing on the actual care services offered. It’s about the life you have and the life you can live with just a little bit of assistance,” White pointed out.

The assisted living campaign for adult

children is for those who know there’s a need, but don’t know where to start. They are primarily adult children ages 55 to 70, but it also applies to any caregiver, such as a senior spouse.

Adult children are pulled in a lot of different directions. They are balancing their families and young kids while caring for aging parents. They are very busy and worry whether they’re doing the right thing while trying to keep it all together.

Adult children caring for an aging parent need to know they can’t do it all alone. And they don’t have to. Assisted living is a beautiful option that benefits parents and children alike.

“Market testing is going to be crucial. Many of the other demand generation campaigns started with a smaller test market before rolling out nationally. That’s certainly something we would recommend as well,” White commented. “It’s important to keep in mind that year one is a research initiative. When you run this cam-

paign for the first time, it’s going to be proving a concept.

“We have a hypothesis. We think that increasing awareness and changing perceptions will increase lead generation and pull through to increased occupancy. The truth is, we don’t know. And so that’s what this is all about. It’s about running a test to find out for sure, and the results of that test will help us focus on how best to roll it out,” she said.

TEST MARKETS

Using National Investment Center for Seniors Housing & Care (NIC) data, GlynnDevins identified three potential test markets with one experiencing high-penetration, another medium-penetration and one with low-penetration for independent living. They did the same with another three markets for assisted living.

When these markets were selected, maintaining cost-effective media buys and avoiding larger markets with expensive media costs was a priority.

For independent living, Milwaukee was chosen for high penetration, Columbus, OH, for medium penetration, and Columbia, SC, for low penetration. For assisted living, Boise, ID, was the high penetration market, Kansas City was selected for medium penetration, and Albuquerque, NM, was the low penetration market.

Whether it’s for independent living or assisted living, “we recommend running in a minimum of three test markets — a high, medium, and low penetration—to make sure that we have the control to see where the most impact is,” White said.

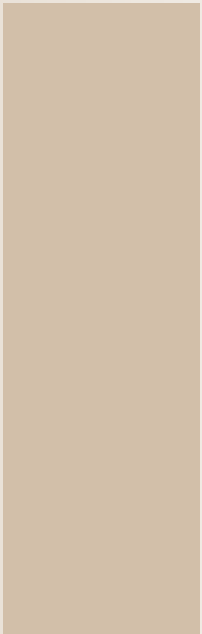
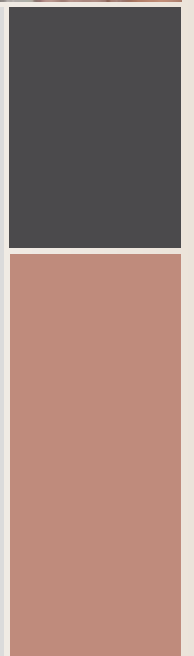
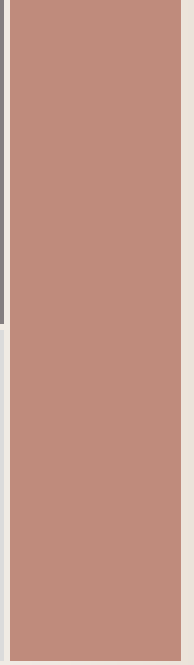
In terms of channel planning and media buys, GlynnDevins recommends reaching the two audiences of seniors and adult children through various combinations of television, digital, online media, social, print and out-of-home, and direct mail. “This breadth of channels is focused on reach to increase awareness. With a multiple touch point campaign, we’re engaging people in a



Trever Sweeney
VENTAS
Tim Sanders
VENTAS



Neal Raburn
GREYSTONE
Kass Matt
LANCASTER POLLARD



Alice Katz
THE VINCA GROUP
Stephanie Heffernan
THE VINCA GROUP



lot of different ways,” White pointed out.

For an independent living seniors campaign, 43 percent of the costs would go to media, 22 percent to creative and production, 18 percent to direct mail, 13 percent to strategy and tracking, and the remainder would be split among digital production, research, social media, and extension.

The cost breakout for an assisted living campaign for seniors would be similar to that for the independent living seniors campaign.

For an assisted living adult children campaign, 58 percent of the costs would go to media, 24 percent to creative and production, 13 percent to strategy and tracking, and the remainder

would be split among digital and production, research, social media, and extension.

FINANCIAL IMPACT

To gauge the campaigns’ financial impact, Glynn Devins estimated that a 0.85 percent increase in independent living occupancy in the test markets would cover the \$5.1 million cost. To break even at \$5.6 million for the assisted living seniors campaign, occupancy would need to increase 1.65 percent, while an occupancy increase of 1.31 percent would cover the \$4.5 million cost for the assisted living adult children campaign.

Measures to track the campaigns’ success include unique URLs per medium, website engagement, social media engagement,

and Where You Live Matters engagement.

Perception testing covers pre-and post-campaign surveys, awareness and perception, likelihood to move and/or recommend, senior living associations, and senior living attributes and advantages.

Post-campaign questions would address senior living ad recall, ad source, campaign ad recall, and campaign impact on likelihood to consider. Senior living community metrics in the test markets would measure performance 12 months prior to campaign launch, quarterly data during the campaign, conversion ratios, move-ins, lead generation, lead generation sources, and website metrics.

If ASHA membership ultimately decided to move forward with testing a multi-media promotional campaign, “we’d reach out to partner with communities in the markets that we would want to conduct the test in, conduct consumer research, and develop the final approach on the strategy and plan development,” McClure reported.

“Creative execution and campaign materials would follow that, with a launch that might be a couple of years from now or potentially a little later. But this will require a lot thought and lots of discussion before anything along the lines of what we presented today would take place,” she added. ■

ESTIMATES FOR YEAR-ONE COSTS THAT COVER ALL FACETS OF A CAMPAIGN FROM LAUNCH TO RESULTS ARE:

IL SENIORS CAMPAIGN

- Milwaukee
- Columbus
- Columbia

5.1M

AL SENIORS CAMPAIGN

- Boise,
- Kansas City
- Albuquerque)

5.6M

AL ADULT CHILDREN CAMPAIGN

- Boise
- Kansas City
- Albuquerque

4.5M

ALL THREE CAMPAIGNS

15.2M

Lynn Katzmann
JUNIPER COMMUNITIES

Wendy Simpson
LTC PROPERTIES



Richard Nix
YARDI SYSTEMS



Tim Cobb
BERKADIA SENIORS HOUSING

Brooks Minford
BERKADIA SENIORS HOUSING

Sabel Kaminski
BERKADIA SENIORS HOUSING



[left to right]

Jeff DeBevec

Senior Vice President
of Communications,
Belmont Village Senior Living

Sloan Bentley

CEO, Lifespace Communities

David Smith

Co-Founder and CEO,
Sherpa and
The Gatesworth Communities



A panel of senior living executives with extensive backgrounds in the business responded to the premise of an industry promotion campaign by discussing their reactions, posing questions and offering suggestions.

Senior Living Industry Promotion Campaign: Reactions, Questions, Suggestions

Panelists were Sloan Bentley, CEO, Lifespace Communities; Jeff DeBevec, Senior Vice President of Communications, Belmont Village Senior Living; and David Smith, Co-Founder and CEO, Sherpa. Sue McClure, CEO, GlynnDevins, served as moderator.

McClure: I'd love to hear what your reaction is to the presentation, the approach, the ideas and anything that caught your attention.

Smith: The research was extremely good and it was well thought out. A program like this, whatever the particular details turn out to be, could be highly impactful. And

you saw the benefits of an occupancy increase of simply one percent. It's a green banana from an investment perspective, and it's going to be a challenge to figure out how to get the money. I loved the messages and the link to Where You Live Matters. I do have a question that I don't have a solution to. Margaret Wylde beat it into my head that we should stop using the word "senior".

DeBevec: Thanks to Sue and Molly. Terrific job coming from my experience on both sides as a client and as a consultant. The discipline and the detail, the depth and the time you put into this

are very good. Where You Live Matters is an education website for the consumer, with the notion we want an educated consumer at the front door, someone who's done some research prior to a very emotional discussion involving family members. An educated, informed customer makes markets work better. And having someone look at our industry as a solution who has this information increases the potential for move in and occupancy.

Whether or not we can actually increase penetration, which is the ultimate goal, needs to be broken into individual steps first. With

a sizable investment, we have to prove to ourselves early on that this is actually moving some kind of needle. Well, what is that needle? I think we've already built it. It's the Where You Live Matters website. The more we recognize the equity we've already put into that website and use it as an informed place for people to visit, a target for a call to action in our media, and as an easy way to track how effective we are early on and get that back to the members, over time it will increase occupancy. It is the locus of information.

Literally, Where You Live Matters is our

headline in this campaign. As we look at the creative, we have to think about using what we already have. Where You Live Matters is a brilliant headline. It's non-judgmental. It lets the person make up their own mind, and as David will tell you and Sloan certainly knows as well, a customer has to come to the decision on their own. They don't want to be sold. That's what this site does.

Bentley: The unified campaign approach is brilliant. I love it. I support it. We all fight that "I'm not ready yet." No matter how many times I describe what life care and the CCRC components of that

product are, everyone says Lifespace operates large nursing homes, which is only 15 percent of our business. We all fight perception.

We know that fighting our number one competitor, the house, is going to be an uphill battle. But the element that all of our communities share is the socialization in the community. Together — for-profit, not-for-profit, CCRC, freestanding assisted living, skilled nursing — we all have that perception opportunity to change. For me, a unified approach is fantastic.

What I saw today, and I've had an opportu-

nity to preview it with Jeff and David prior to coming in today, is a campaign that has multi-facets. I have a question about its complexity. And I was surprised about Got Milk's barrier and Go RVing's success. They're both very short, simple, direct and consistent. The campaign that we saw today can be bifurcating between AL and IL. That has some concerns. But I'm a full supporter of a perception campaign.

McClure: What would be the likelihood of your organization supporting this initiative and why?

Bentley: As a not-for-profit provider, we

have done multi-year supports for different initiatives. I would be proud to have Lifespace Communities be a leader in this initiative.

DeBevec: I work for Patricia Will. She has been a big supporter of education from day one. So certainly, we would write a check, even if our markets did not coincide with the pilots.

Smith: I have a harder time on the community side saying that we would be supportive, because we have a small upscale community, small in numbers. It's hard to ferret out of that group effort what your actual benefit would be. As



Derek Zeller
BMO HARRIS HEALTHCARE
REAL ESTATE FINANCE

Ryan Stewart
BMO HARRIS HEALTHCARE
REAL ESTATE FINANCE

Chris Kronenberger
BLUE MOON CAPITAL PARTNERS



a thought leader, and having been involved in terms of sales and looking to increase occupancies, I would be a supporter. So more on the Sherpa side and less so for Gatesworth.

McClure: Glynn-Devins certainly would back this as well. What are the advantages and potential pitfalls of supporting a campaign like this?

DeBevec: My father worked for the JC Penney Company for 40 years. He was the world's best salesman. He always said if you don't advertise, nothing happens. I believe in that. What we're doing here very

simply is making our local markets work better. We can't answer for the communities across the country and ASHA individually, but we can have a tailwind to help everyone understand the consumer and help the consumer better understand what we have to offer.

Our role as I see it is helping each individual market — however the communities want to approach their sales process after they come in through the front door — by making their local marketing work better. The disadvantage is an opportunity cost to spend money elsewhere.

Bentley: I'm concerned about the products and services that will enable our prospective residents to stay in their houses longer. That could become a jail for them from a social isolation standpoint. The advantage is to attack this perception that this is your grandmother's nursing home. It's so much more. I do believe that our residents live longer, happier, healthier lives in our communities. For our industry as a whole, getting behind a campaign that affects perception is a huge advantage. I thank ASHA for being a leader in that.

The disadvantage is, of course, understanding the ROI on this, in that I don't believe that it will impact our occupancy immediately. It's going to help to counter balance all the other choices for the residents to stay at home. I love the measurement components, so we're able to actually provide feedback. This is not a short-term investment. This is a long-term investment.

DeBevec: There's another side to this, too. We have to be aware of careers. The more positive messages that are out there, the more attractive seniors housing becomes. We're starting to see



Sheryl Marcet
FORMATION CAPITAL

Jacob Gehl
BLUEPRINT HEALTHCARE
REAL ESTATE ADVISORS

Sevy Petras Wells
PRIORITY LIFE CARE

Sara Veit
OMEGA HEALTHCARE INVESTORS





Noah Levy
PGIM REAL ESTATE

ASHA extends its deep appreciation and warmest wishes to Noah Levy upon his retirement from PGIM Real Estate. Noah was a member of the ASHA Executive Board for over 20 years and served as its Chairman from 2004 through 2005.

excitement about that, and that's what this is all about too. There's a career upside.

McClure: That's a great point. Funding is going to be an important part of this initiative. We shared some of the different mechanisms for funding. Are there any other ways we might think about that? Did we cover all of them, or are there some other possibilities there to explore?

Smith: The one that I have thought about are vendors who benefit from higher occupancies. The other thought I had was long-term care insurance. Long-term care insurance is going through a nose dive over the last 10 years. They have a dramatic need to do their own Got Milk-type campaign and raise awareness.

I want to just read you this from Hartford, the large insurance group that has long-term care. They partnered up with MIT AgeLab, and they wrote articles about pitfalls of staying home versus assisted living, which you wouldn't necessarily expect from them, and yet it's so close to

our message. I really like their three questions that can predict the future of your quality of life. Who will change my light bulbs? How can I get an ice cream cone, and who will I have lunch with? They're all directed at building up the value of having a funding vehicle for private pay senior housing as we get older. It may be a good partner.

The other thought that I have is their legislative agenda coincides a lot with ours. They're working on trying to get deductibility from 401ks, tax free, to promote employer inclusion of long-term care insurance in employee benefit plans. Those would help us as well.

Bentley: How do we rally our own troops first? It's by leadership. When I think of the not-for-profit world, which is where I live in, I'm looking at the larger organizations, larger providers and systems. How do we make a multi-year commitment to such an endeavor? That would be part of what we all have to step up to the plate for.

McClure: I'm going to shift to the campaign itself. Molly walked through a lot of the different channels and media outlets that we might utilize. Jeff, you've spent a lot of time in this world. Do you have any specific thoughts on the media channels? You mentioned the importance of Where You Live Matters and the digital channels. Other thoughts on that?

DeBevec: It was dead on. All of the media that you looked at was analyzed and presented in a way that I would have done myself. An ad in national reach publications like *The New York Times*, *The Wall Street Journal* or *USA Today* to spread the word is a quarter of a million dollars one time. Clearly that's something you can't do, and that's why we go to pilot markets that are lower or medium markets to test an idea before you start spending any big money. Any agency that worked with national brands will tell you its costs 20, 30 million dollars for a national campaign. So running a \$5 million pilot is in line.



Cathy Voreyer
WELLS FARGO

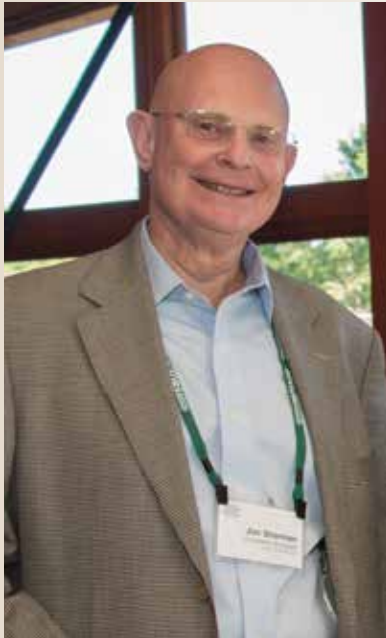
Steve Blazejewski
PGIM REAL ESTATE

Lisa Widmier
CBRE CAPITAL MARKETS



James Yoder
STEADFAST COMPANIES

Patrick Dimanno
PATHWAY TO LIVING



Jim Sherman
DOUGHERTY MORTGAGE



Ashley Wilkens
ZIEGLER

Ray Oborn
UNITED PROPERTIES

Steph Kolbo
NRC HEALTH

Rich Kortum
NRC HEALTH



I did a little analysis myself about some of our competitors, and we do have direct competitors in our industry, besides the perception, which is a sort of a competition. There are companies that want seniors to stay in the house. Visiting Angels, Home Instead come to mind. I don't know how many in this room listen to drive-time NPR radio to and from work. I listen to it every day. I'm hearing more and more of their spots. And they sound like this: "Support for NPR comes from this station. From Visiting Angels, professional caregivers assisting adults at home in bathing, dressing, meals and light housework nationwide. Visiting

Angels, America's choice in senior home care. Learn more at 1-800-365-4189."

That makes my blood boil every morning, because I know that they're keeping people in the house. That's good for some, but it's not good for all. That's competition, that's a message that's getting out there.

Visiting Angels and Home Instead, according to research by a media organization, spend about \$5 million a year. They're competing pretty much at the same level that you put together, Sue, on your models. They're spending a half a million on NPR radio, with a very clear cut, easy to produce, announcer-read

national campaign. As far as the media is concerned, that's an educated, high-income market that's in the car. You're getting a brand awareness every day over the course of a year.

For Where You Live Matters and any campaign that we do, we have to think about do you want a call to action, or do you want to increase awareness? Increasing awareness is nebulous, because you have to measure it in ways that may not be very accurate, and it's expensive to do. A call to action campaign would be something that you would be able to measure quickly, because you can measure calls, you can

Paul Ciccerio
ONSHIFT

Vince Gerbec
ONSHIFT



measure clicks to the website. Where You Live Matters is going to be a really important component of that trackability. For any media that we do, are we doing awareness, or are we doing call to action?

If you're doing a campaign for clicks and for call to action, mostly you're doing things that people can respond to when they hear it that's in the house. So outdoor doesn't work. Radio doesn't work too much either, because it's in-car, and they can't respond. If you're doing awareness, NPR would be an exception. Those considerations would need to be brought to bear on the type of media that you

use. But basically, all the options are correct and on the table, and I think that if you look at analysis of what other people are doing in our business, they're using cable. They're using social and digital display and search, and a little bit of print. And those are the ones that you recognize.

McClure: I love the way you broadened the competition to others that are advertising and competing for share of mind and are getting in other people's heads and working against the perceptions that we might want to create. I think those are all great observations.

Bentley: When I was looking at your presentation again today, I

thought your channels and your approaches were very innovative. All the channels and the media that you outlined and those combinations are very, very important. I have to go back to the point of three campaigns. Are we going to be effective and leave one message? That, again, is my concern when we look at these approaches.

McClure: It would be good to get behind one and really focus and go all in. I agree. Our next question is how would a campaign like this impact the readiness of sales prospects? Could we soften them up before they come in?

Smith: Absolutely — and after they come in. Most people who hav-

en't inquired, or even if they have inquired, simply aren't ready. Yet we have really happy and satisfied residents that wish they would have moved sooner. I call this the readiness gap. I've become fascinated by it for the last 30 years. The resistance that exists is multi-layered, and this campaign would address some of those layers and reduce the resistance. The resistance is based upon ageism in our society. It's based on a generational bias that this particular generation has, just like we look at Millennials and what their generational bias may be. This generation of seniors has a bias against congregate living.

Lindsay Casillas
SODEXO SENIORS



Then there's what others call a developmental resistance. This campaign is really directed toward better awareness and perception-changing in terms of ageism, and perhaps in terms of the generational bias, although I think that's much more difficult to overcome. My point is that if this is the most effective it can be, this is still going to be a difficult sell in any event.

The other thing I wanted to mention is this campaign could be the most effective after someone inquires by nurturing and helping our existing lead base get ready. For IL, AL and most CCRC

stabilized properties, we have way too many leads and not enough time. So whether success should be measured by more leads, I'm not sure. At some point it's got to tie back to convergence.

McClure: Sloan, before you became a CEO, you spent a lot of time in the sales and marketing world. What do you think about this campaign's ability to impact the readiness of sales prospects?

Bentley: In life care, we have an 18-month sales cycle. We'll see a resident and family members probably nine times before they make a decision to

move. It's part of education. I love fighting the ageism. It's the acceptance that there's so much more out there than the nursing home. This would be a great benefit. I see this as a supplement to our media, our education, our collateral pieces that we utilize, because we're always trying to reach that next step of the visit. What's the lure? How do we move them through the sales process? This is another element in the sales toolbox.

McClure: What are some other ways we might raise awareness and understanding of the senior living industry? Are there other

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Brian Heagler
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ways we might accomplish something similar that you can think of?

Smith: For stabilized properties, I would say one prospect at a time. We don't have a great handle on what our conversion rates are. I know that ASHA's going to be studying benchmark conversion ratios to try to refine that. The best information that I've found is that the typical move-in ratio is about 22 percent. The best performers are getting 40, 50 and even 60 percent, especially in the higher acuity levels. If we could pick up five to 10 percentage points in terms of the visit-to-move ratio, I bet we

would capture more than the one percent we're talking about with the awareness campaign.

DeBevec: If we had an angel that dropped \$5 million on us today, what would we do with it? Public relations has worked really well for our company. You have to invest in it. It's a lot of legwork, but the media today, because they have downsized so much of their information and news gathering staff, are hungry for stories. And any of you in the audience know this if you've actually promoted the notion of reaching out to the media, We could spend \$5 million on a national

PR campaign with all the major media across all of our markets. That's another way.

Other industries have approached it in different kinds of ways. Co-op advertising is very interesting, where with any of our individual company advertising campaigns we could help support a promotion campaign, as long as we put the Where You Live Matters bug on the ad with support from a certain amount of money in terms of co-op. Intel has done that. The Cotton Council did that in the '60s and the '70s. One of these organizations went to a group of major media organi-

zations and said, give us a discount if we help you gather advertising.

McClure: What was your reaction to the campaigns we showed today? Do you think they're sufficiently focused or narrow enough to make an impact?

Bentley: You understand my concern about the multi-tier approach. But the thread was very strong with the positivity. All of them took large steps in that positive approach. You've been working on this for six months. This was the reveal. You're going to be getting more and more feedback, but as



you continue to fine tune, that positivity and perception need to be the primary focus.

DeBevec: I agree, Sloan, entirely. The three tier thing is too complicated. We've already got the best headline on earth with Where You Live Matters. It's non-judgmental. In a very nuanced way, it lets the consumer come to his or her own conclusions, which is the best way to close a deal. They make up their own mind. It doesn't say persuasion. It says education, and yeah, I need to think about that. It may take two years or more, but over the long term.

We need to focus more on Where You Live Matters and then that would cover all of us.

McClure: There'd be a nice interplay. We've already said we need to leverage the Where You Live Matters site. Why not drive that home? Next up, I'd like to get your thoughts on the campaign measurement and metrics proposed. Any other ways that we might

consider measuring the campaign?

Smith: I would come back to conversion ratios, because that is the leading indicator before you get to occupancy and the one that we can impact and have the greatest opportunity to impact.

Bentley: I love that measurement and metrics are a core component of this program. It's how do we package it for my peers and our boards to sell this and help them sell it to their boards? We're looking at not only a multi-year campaign, but a significant dollar amount that would need to be part of the package to sell the value proposition.

DeBevec: You teed this up by comparing GoRVing with Got Milk. Got Milk had great ads, and all of us remember Mick Jagger with milk on his lips. But at the end, all of the ad people say it just didn't work. I don't know if they listened. RV listened. And the importance of metrics comes in. We pilot it out and need to make the metrics easy to measure. Hear what

the consumer reaction is from those metrics, and then adjust and tweak over time. We'll be better served.

McClure: Any final comments that you'd like to make in summary?

Bentley: We need to leverage all the associations and all the key leaders. We need to identify a group of core leaders that will take this and serve as spokespersons, but also as fundraisers.

DeBevec: The verticals in our industry, such as the investment community and vendors, have a stake in this. We need to involve everybody in the financial underpinning of this. And we have to realize it's long-term.

Smith: It's not surprising that ASHA is considering and supporting this, because after all, legislation is forward looking. It is long-term in its nature. Where You Live Matters has already been in many respects a success. And I commend ASHA for taking it on. ■



Michael Damone
CEDARBROOK SENIOR LIVING

Kevin Carden
AMERICAN HOUSE SENIOR LIVING COMMUNITIES



Heidi Begeot
BARINGS MULTIFAMILY CAPITAL



Hedy Rubinger
ARNALL GOLDEN GREGORY

Alexis Evanich
POINTCLICKCARE



Jerry and Nanne Finis
PATHWAY TO LIVING



[left to right]

Aaron D'Costa
Green Courte Partners

Charles Turner
Invidia for Seniors

Guy Geller
CPF Living Communities |
Grace Management

Joel Goldman
Hanson Bridgett



Senior living communities are constantly on guard to protect against safety and security threats. In a world where theft, arson, assault, natural disasters and any other number of dangers are all too real, anticipating the potential for harm and hazards is imperative.

Safety and Security in Senior Living Communities

Recent news reports from Dallas are a stark reminder of why an unrelenting emphasis on risk management is so important. In March, a man was apprehended in the investigation of a woman's death at an independent living community.

He is the lead suspect in a series of potential homicides at senior living communities, where the suspect allegedly would pose as a home health care or maintenance worker.

Balancing hospitality and independence with safety and security is a complex proposition. During the American Seniors Housing Asso-

ciation's 2018 Mid-Year Executive Board Meeting, panelists exchanged thoughts on upgrading and tightening the oversight of visitor access, camera systems, background checks, resident unit protection, and on-site security.

Participants were Aaron D'Costa, Green Courte Partners; Guy Geller, CPF Living Communities and Grace Management; Joel Goldman, Hanson Bridgett; and Charles Turner, Invidia for Seniors.

REGISTERING AND SCREENING

At the outset, the panel agreed that registering

and screening visitors must go beyond simply asking them to sign a log-in sheet.

With a clear need today for active shooter policies and procedures in locations that are readily accessible to the public, and a greater emphasis on preparing for natural disasters such as tornadoes, floods and wild fires, senior living communities must respond in kind with precautionary plans, systems and training.

In assisted living where the need for extensive engagement with residents is obvious, safety and security measures are easier to

implement with support from residents and families. Independent living, however, poses challenges where these measures could offset efforts to promote hospitality and maintain boundaries for independence.

Technology can ease resistance to oversight in independent living by employing cameras, fob systems, and electronic keys. These systems not only can measure how often residents interact with staff, but also provide an audit trail in the event of an incident.

But in many cases, these systems rely on proper use by resi-

dents and restricting use by non-residents. And enforcing policies related to this technology may meet with resistance from residents. Residents may prefer to leave the doors to their units unlocked, for example, which can lead to security breaches.

Visitor management systems stationed at communities' reception areas that screen and credential health care providers and vendors, and include a sign-in system for visitors received broad support from the panel.

Features typically include photographing visitors and third-party health care providers, notifying management via text or email when specified visitors sign-in, and listing visitors and residents who are in the community from a computer, smartphone or tablet.

Wearables are another tool. One panelist reported that an employee was terminated following accusations of theft. When a labor attorney challenged the termination, the operator provided videotape of

every unit the former staffer entered and also included a heat map of the time spent in those units. No further legal action was taken.

One way to guard against staff infractions in resident units is by installing a security system for keys that apartment operators use. These may feature finger print scanning or facial recognition when staff sign keys in and out, thus avoiding the need for master keys.

TECHNOLOGY TRAINING

Whenever technology is in place, its success

Meagan Rohan
CAREMERGE

Rebecca Beam
SENIOR LIVING COMMUNITIES



Jeff Sands
HJ SIMS

Curtis King
HJ SIMS

Brett Edwards
HJ SIMS



hinges on training and procedures. And with staff turnover, retraining is a constant. Without processes and consistent compliance, technology is severely limited.

As senior living focuses on moving away from perceptions of clinical, institutional environments by promoting hospitality and residential settings, peace-of-mind nevertheless is vital. This requires significant investment to properly deploy new systems and upgrades.

The cost for camera systems was esti-

mated in the low tens of thousands, with better pricing for newly constructed properties. Keyless electronic RFID locks run about \$300 per installation compared to a traditional door lock that costs \$120 to \$150 per installation.

The electronic management systems that screen and credential visitors are often paid for by charging health care providers and vendors fees for access licenses.

The backbone for so much of this technology is a powerful

WI-FI system. This can reduce the cost for nurse call and camera systems by avoiding the need for wiring and other hardware. But in older buildings, WI-FI installation costs often exceed the cost of the systems WI-FI supports.

Compounding safety and security challenges in independent living are properties that often have a large footprint with multiple entry and exit points. Residents occasionally prop these exterior doors open to access their cars or move items in and out of the building.

Cameras stationed at these access points provide video that can be shared with residents when explaining the dangers of leaving entryways propped open.

STAFF OVERSIGHT

Another distinction between assisted living and independent living is the level of staffing. In independent living, staff typically are very familiar with the residents and their routines. But staff doesn't engage with them day-to-day the same way they would in assisted living or memory care communities.



Visitor management systems received broad support.



This raises questions about manpower and the proper amount of oversight at independent living properties. In older communities where it is more difficult to implement technology upgrades, security personnel provide peace of mind for residents and family members.

Some panelists use security personnel on the overnight shift, while others contract with third parties to conduct random patrols at their properties.

Feedback from residents and families has been encouraging. The presence of someone in a uniform is reassuring and is yet another level of deterrence to discourage unlawful activities.

Background checks are routinely conducted for assisted living personnel. But independent living staff may face less scrutiny, while typically very few background checks are conducted for senior living residents.

One panelist commented that a limited number of resident-related infractions have arisen, and when they have, it usually involves resident-to-resident confrontations in memory care settings. On the other hand, family members such as a grandson with substance abuse issues may engage in theft or other illegal activities on a community's premises.

Resident background checks raise thorny issues related to liability and discrimination. For example, if a new resident with an incidence on record from five years ago moves in, while another individual is denied residency because of an infraction from three years ago, will there be a lawsuit?

Another panelist, meanwhile, reported that residents at some properties are able to request that their communities run background checks on

third party health care providers and other individuals.

Credit checks are another option for screening potential residents. In the case of CCRCs, they typically conduct credit checks and financial screening, while apartments require credit checks.

Senior living residents have been known to move into a community and after being evicted for nonpayment, move to another community for three or four months before another eviction ensues.

Panelists concluded their discussion by agreeing that there is no standardized solution to preserve safety and security. Emerging technologies offer what are often cost effective systems to upgrade communities' oversight, and the success of safety and security measures hinges on policies and procedures that are strictly adhered to with ongoing training. ■



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PATRIOT ANGELS
Suzette Graham
PATRIOT ANGELS



Wendy Lord
HUNT MORTGAGE GROUP



Rob Day
G5



Jerry Frumm
SENIOR LIFESTYLE
Scott Kavel
GREYSTONE





Greg Patton, Ph.D.
USC,
Marshall School of Business



Improving leadership effectiveness by becoming a better mentor and increasing efficiency starts with self-assessment.

Improving Leadership Through Self-Assessment, Awareness and Motivation

Self-examination, self-expectation and self-direction are precursors to development and growth. Change comes from within through awareness that leadership development is self-development.

These were the themes that Gregory Patton, Ph.D., stressed during a discussion on leadership traits, behaviors and skills. He is a professor at the USC Marshall School of Business where he focuses on communication and interpersonal and leadership effectiveness.

“If you see your employees as leaders and mentors, they start to do that,” he explained. “If you see them as workers, they start to

act as workers. If you see yourself as a strategic leader, you’re more likely to progress much more quickly. This is a precursor to growth and development.

“By building awareness and motivation, you can become much stronger,” he continued. “Your people can become much stronger, and that’s part of your job. The job of a leader is to enable and empower, and it starts with self-examination. How does someone see themselves?”

Research indicates leaders have the potential to be up to eight times more effective. Achieving this starts with self-examination. “Leadership is

vision and strategy for enabling and empowering others. It all starts with how you see yourself,” Patton said.

“Have your staff design the perfect leader. Look at traits like vision, communication, empathy and thoughtfulness,” he suggested. “Compare it to how you see yourself. Do a gap analysis.”

According to Patton, the three most important leadership behaviors are communication, vision and flexibility.

“Communication includes listening, emotional intelligence and empathy. If you don’t communicate with other people, if you don’t play

well in the sandbox, you’re never going to be successful as a leader,” he observed. “It doesn’t mean you’re talking all the time. It means you’re listening to what’s said and not said.

“Vision means you’ve got to be able to see on the other side of the mountain. You’ve got to be able to figure out where things are going, where you want to be two, three years from now. Flexibility might be called strategic agility, but it’s the ability to change every day,” he said.

Growth must come from within, and it must be a priority for learning and understanding.

DIAGNOSING AND DEVELOPING LEADERSHIP ATTRIBUTES CAN BE BROKEN INTO FIVE STAGES:

1 PRE-CONTEMPLATION	Unaware or under-aware of problems. Ignorance is bliss. There is little or no consideration of change.
2 CONTEMPLATION	Recognition and awareness that an important problem exists. Serious thought goes into overcoming it. This stage often involves assessment, recognition and analysis of individual strengths and weaknesses.
3 PREPARATION	High awareness with a willingness to take action. Often includes the creation of a specific, actionable and measurable plan.
4 ACTION	Modify behavior, experiences or environment in order to overcome problems.
5 MAINTENANCE	In this stage individuals work to maintain new skills and consolidate gains attained during the action stage. In this stage individuals work to maintain new skills and consolidate gains attained during the action stage.

“When you coach or mentor someone, don’t go in and tell them what to do. Ask them where they want to be in two, three years. Maybe they want to move up to a management position. Ask them to do some informational interviews with a couple managers and find out what skills are really important and come back and talk about the skills that are needed. Then it’s easy to develop at that point,” Patton commented.

Developing skills can be broken down to five stages:

- Awareness
- Motivation
- Technique
- Opportunity
- Support

“I want you to get one percent better in everything you do,”

he said. “If you’re going to hold a meeting, think how can I use this as an opportunity to develop? How can I ask questions versus telling people? How can I facilitate it more clearly, more effectively?”

“And then when the meeting’s over, I want you to ask for feedback. What are your people going to say? Oh, it was great, just like always. Then you immediately say, okay, what’s one thing I can do better? Oh, well... because they always have one thing.

“If I get one suggestion every day, and the person next to me doesn’t get any feedback at all, and I use that to get one percent better each day, what’s going to happen by the end of the year?”

he asked. “What’s going to happen to my business? What’s going to happen to my numbers? What’s going to happen to my staff turnover?”

Problem solving becomes far more effective when teams share ideas and interact. But the tendency in today’s work environment is to spend an inordinate amount of time in front of a computer. “That’s one of the most inefficient ways of solving a problem,” Patton noted.

“Walking around, talking, bringing people to a meeting, or calling people you’ve met at a conference helps by sharing ideas,” he said.

One tactic for purposeful leadership that Patton strongly recommends is starting each day by

setting and reviewing strategic goals. "For the first three minutes at your desk, sit down and stop. Do not turn on your computer. Pull out a notebook and think, what is strategically important today? What are my strategic goals for today? What do I need to do?

"Maybe it's to connect with customers. Maybe it's to build the staff. Maybe it's to increase operational efficiency. Whatever it is, spend three minutes to be purposeful. And then when you go into the meetings, it's not just going to meetings. How can I use this meeting to develop my staff? Who can I have facilitate it? Who can I have present? What can I do so that there's a significant difference by the end of the day to get one or two percent better?

"You start to think about how yesterday went and how today could be and how you can be more purposeful," he noted. "And what happens is, the problems start to fade away, and the problems don't become so big because you're much more proactive." ■



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WELLTOWER

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