

AMERICAN SENIORS HOUSING ASSOCIATION

VISION

**LIVING
LONGER
BETTER**

MISSION

ASHA is the industry thought-leader promoting quality and innovation, advancing industry knowledge through research, exchanging strategic business information and influencing legislative and regulatory matters.

**AMERICAN
SENIORS
HOUSING
ASSOCIATION**

CORE PRINCIPLES

Promote a favorable business climate that supports quality, competition, innovation and long-term investment in seniors housing

Advance information and research that frame and influence key industry initiatives

Promote the identification and advancement of emerging industry leaders who reflect the increasing diversity of the business

Support research and national initiatives that enable senior customers to receive high quality services and live with dignity in the setting of their choice

5225 Wisconsin Avenue, NW | Suite 502
Washington, DC, 20015
(202) 237.0900

www.seniorshousing.org

ASHA GOALS, OBJECTIVES AND OUTCOMES FOR 2021 – 2026

GOALS

ADVOCACY

Deliver a coordinated legislative program at the federal level with select engagement on state policy.

RESEARCH AND EDUCATION

Promote the value proposition of age-qualified housing and encourage the continued pursuit of quality and innovation.

MEMBER ENGAGEMENT

Provide senior executives and next generation leaders with a unique forum to share cutting-edge research, best practices and business opportunities.

OBJECTIVES

- ▼ Maintain a robust federal advocacy program and Seniors Housing PAC that effectively identifies and addresses the threats and opportunities facing the senior living industry.
- ▼ Engage the Public Policy and Executive Committees to prioritize a federal legislative agenda and oversee disbursement of the Seniors Housing PAC funds.
- ▼ Educate policymakers and enhance awareness of seniors housing regarding the benefits of seniors housing to residents, families, staff, and the health care system.
- ▼ Provide timely and substantive communications on federal and select state policy issues and expand members' awareness of legislative and regulatory developments.
- ▼ Leverage the relationships between ASHA members and Members of Congress to maximize the effectiveness of the advocacy program.

- ▼ Document the benefits of industry products through qualitative and quantitative research and effectively engage with other meaningful research efforts.
- ▼ Identify how the industry can expand market share, reduce move-outs, and improve overall operating performance.
- ▼ Provide needed, credible information to help members better understand the customer and to help the customer better understand their choices and the benefits of age-qualified housing.
- ▼ Effectively deliver essential information to targeted consumers via Where You Live Matters and state-of-the-art media channels--website, social media, email and print.
- ▼ Use research results to enhance the effectiveness of advocacy and public relations efforts.

- ▼ Offer members strategic, engaging and forward-thinking content that brings new ideas and approaches to our industry at the Annual and Mid-Year meetings.
- ▼ Hold regional roundtables to highlight and share information about trends, best practices, innovations and new research.
- ▼ Use the Executive and Meeting Committees to advise, plan and focus meetings in concert with ASHA staff.
- ▼ Expand the diversity of ASHA membership and participation.
- ▼ Provide digital meeting opportunities on a regular basis to expand the benefits of membership.
- ▼ Engage Rising Leaders to facilitate professional development, broaden member diversity, and improve the dissemination of ASHA's work.

COMMUNICATIONS

External: (Legislators, Regulators, Consumers, General Public)
Internal: (ASHA Members, Rising Leaders, ASHA App)

OUTCOMES

Results oriented, high impact federal advocacy

Cutting edge research and information highlighting the benefits of age-qualified housing

Innovative and strategically focused interactions for senior executives

STRATEGIC PLAN ACTION ITEMS

| ACTION | GOAL |
|---|---|
| Anticipate that challenges from the COVID crisis and a changing political environment will require more advocacy diligence re. the tax code, federal oversight, and payment for services provided to residents. | Advocacy |
| Develop an effective strategy to get policy makers into member communities. | Advocacy |
| <p>Increase engagement by strategically broadening the dissemination of information and research opportunities to select executives:</p> <ul style="list-style-type: none"> • Rising Leaders as key disseminators. • Advocacy and PAC contacts to receive related communications and serve as a point of contact for SH PAC campaigns. • Increase marketing and sales executive's engagement in Where You Live Matters. • Increase member participation in ASHA research projects. | Advocacy/Research and Education/and Member Engagement |
| Research developing an ASHA app that would allow members to easily access communications, newsletters, reports, meeting information, etc. | Research and Education |
| Host regular Zoom calls and/or short topical podcasts with guest speakers. | Member Engagement |
| Finalize and rollout a new ASHA identity package to include a new logo and a refresh of newsletter design and other communication collateral. | Member Engagement |
| Encourage members to identify prospective new members, then invite a select number to attend meetings. | Member Engagement |
| Refresh the membership brochure to be more oriented to "why you should join ASHA". | Member Engagement |
| Create new councils or committees linked to ASHA objectives (e. g. Marketing & Sales, Industry Promotion, Research, Meetings, Tech Innovation, Membership). | Member Engagement |
| Add an experienced communications professional to ASHA's in-house staff to enhance member communications and pursue public relations initiatives and opportunities to promote ASHA's Vision, Mission and Core Principles. | Advocacy/Research and Education/Member Engagement |



September 29, 2020

ASHA STRATEGIC PLANNING REVIEW 2015 to 2020

ASHA's extensive strategic planning process began in 2014 and resulted in the implementation of a five-year plan (2015 – 2020) that expanded the focus of the American Seniors Housing Association to include consumer education and development of future industry leaders, restructuring our meetings, and strengthening our research program appreciably.

This special edition of the Seniors Housing Update reviews key elements of ASHA's 2015 – 2020 Strategic Plan.

1. Consumer Education: Educate the general public on the benefits of senior living and highlight the multi-faceted dimensions of the consumer experience.

In late 2014, ASHA assembled a Consumer Education Program Committee comprised of Sara Abraitis of Sunrise Senior Living, David Carliner of Brightview Senior Living, Jeff DeBevec of Belmont Village Senior Living, Meghan Lublin of Sunrise Senior Living, Jonathan Ruchman of Brookdale Senior Living, Doug Schiffer of Allegro Senior Living, Margaret Wylde, Ph. D., of ProMatura Group, Letitia Jackson of Senior Star, Meg Ostrom of Enlivant, Jim Bowe of GlenAire HealthCare, and Dan McConnell, ASHA's public relations counsel (now deceased).

Following an extensive RFP process, ASHA engaged GlynnDevins, a marketing communications firm that focused exclusively on senior living, to help develop our Consumer Education Program. The centerpiece of this program was a robust digital platform, now known as Where You Live Matters (WYLM), that launched in 2016. The Where You Live Matters website (www.WhereYouLiveMatters.org) has had well over one million visitors since it launched and guides seniors and families so they make informed, meaningful and personal decisions about senior living.

The Where You Live Matters website has been steadily expanded since its launch in 2016 and has stayed true to the original themes of the project: a) update the image of our communities; b) educate consumers about options; c) build platforms of trust and change perceptions; d) counter the notion that remaining at home is always best; e) motivate consumers to make the initial inquiry; and f) maintain an emphasis that this is an authoritative public service.

The Where You Live Matters website was built out in phases, including the addition of a Community Locator Tool in 2018, which was added to allow consumers to search for communities in the U.S. and Canada. Members of the Association who were encouraged to add their communities at no cost, currently have over 4,000 communities that are part of the

Community Locator. ASHA's Consumer Education initiative was also expanded to include a significant social media presence including both Facebook and Instagram.

Where You Live Matters also became a significant vehicle for ASHA to communicate with the public during the COVID-19 crisis. A special section was created called "Senior Living Today, and Every Day" to show how the industry was responding to the crisis. An extensive public relations campaign launched by ASHA targeted a number of major media sites, and banner ads with click throughs allowed the public to learn more about the industry's response to COVID-19 by watching video content and reading specially tailored content that helped set the record straight with factual information. Year to date (through August 2020), more than a half million consumers have visited Where You Live Matters and over 7.9 million have viewed WYLM content on Social Media.

2. Meetings: Restructure meetings to better engage, educate and inform members.

A key recommendation during the 2015 - 2020 Strategic Planning Process was to create a more significant and meaningful meeting forum for our Executive Board and Advisory Committee members during the mid-year.

Beginning in 2016, we introduced a new meeting cadence that began with the Annual Meeting in January, and then launched our inaugural Mid-Year Meeting (which was held at the Omni Interlocken Resort in Broomfield, CO) for both Executive Board and Advisory Committee members.

The Annual Meeting was restructured over the five-year period to allow for additional interaction during expanded activities beyond our annual golf tournament. Members were offered opportunities to participate in group bike rides and other opportunities, including a whale watching event when the group bike ride was not feasible to host. The restructured Annual Meeting centered group activities at the front of the meeting, allowing more members to participate in the afternoon breakout sessions and property tour.

Since its launch in June 2016, the Mid-Year Meeting has been highly rated by attendees and featured educational content, group activities, roundtables, and networking. The restructured meeting schedule provided our Advisory Committee and Executive Board with a more substantial and meaningful meeting experience and resulted in the elimination of what had been a stand-alone Spring Executive Board Meeting.

3. Leaders: Create a systematic process for identifying prospective members and developing future ASHA leaders

ASHA's Rising Leaders Program was officially launched in 2015, focusing initially on individuals within Executive Board member companies and then adding from a select number of Advisory Committee members. Those designated by their companies as Rising Leaders are given complete access to ASHA's extensive online resource archive and receive copies of ASHA's newsletters, Special Issue Briefs, and research reports. The first education program exclusively held for the Rising Leaders took place in September 2015 featuring remarks from former ASHA Chairman Noah Levy of Prudential Real Estate Investors. Beginning in 2016,

specific programming for the Rising Leaders was created and incorporated into the Mid-Year Meeting. The Rising Leaders program has grown steadily since its launch from 55 individuals with 40 companies to 178 from 100 companies.

4. Advocacy: Develop a coherent, coordinated legislative program at the federal level with increased focus and select engagement on state policy.

ASHA's legislative team has engaged and been instrumental in a number of major legislative victories for the industry during the period of 2015 – 2020. Our policy priorities have focused on real estate taxation, labor and employment issues such as union organizing and Department of Labor (DOL) overtime rules, creating incentives for long-term care financing, immigration reform to address workforce shortages, funding of NIH for Alzheimer's Research and associated issues to improve treatment and care for those suffering with Alzheimer's (The Bold Act), and other issues that impact senior living for operators and consumers. During the 2017 Tax Cuts and Jobs Act deliberations, ASHA successfully secured language to ensure that senior living was not excluded from the definition of "real property trade or business," thus enabling full deduction for business interest. ASHA's success preserving the business interest deduction in the 2017 tax bill received further codification this past summer in published IRS guidance.

ASHA also successfully advocated for the extension of the 7.5% income threshold for the Medical Expense deduction. Other initiatives that support our advocacy efforts include research to identify Medicare Advantage opportunities, responding to a GAO study that assessed Medicaid spending in assisted living communities, updating Fair Housing and ADA Compliance Handbooks, and participating in joint studies with our real estate trade association partners on potential revisions to the Like Kind Exchange (LKE) and impacts of the GOP Tax Reform Blueprint which served as the basis for the 2017 Tax Cuts and Jobs Act. ASHA works in several coalitions to advance or defeat common policy priorities such as immigration reform and labor organizing efforts.

More recently, ASHA has worked tirelessly for the industry to secure funding from the Department of Health and Human Services (HHS) Provider Relief fund, which is expected to allocate between \$2.5 and \$3 billion in the initial funding announced on September 1. We have also led efforts to ensure the industry (workers and residents) receives prioritized access to a vaccine for COVID-19 when one becomes available, and are working with other industry and business organizations on legislation that limits liability related to COVID-19 claims.

ASHA legislative staff and counsel have worked closely with the staff of the other senior living industry organizations, including Argentum, LeadingAge and AHCA/NCAL, to ensure successful policy coordination and messaging among the organizations. These efforts have increased in the throes of the COVID-19 crisis with weekly meetings taking place with the leaders of these organizations and the National Investment Center for Seniors Housing & Care (NIC). Our efforts are ongoing as Congress and the agencies continue to address funding needs and prioritized testing and vaccination for the industry.

In the five years since the launch of our 2015-2020 Strategic Plan, ASHA increased its monitoring of state policy and continued to engage selectively at the state level.

In 2020, for example, ASHA has engaged in two state issues filing Amicus Curiae briefs in Maryland and in California. ASHA filed an Amicus Curiae Brief in the Court of Special Appeals of Maryland in support of Shelter Senior Living IV, LLC v. Baltimore County, Maryland, in a case deciding whether recordation and transfer taxes are due on the value of intangible personal property, including goodwill, transferred in a business sale when recorded deeds evidence only conveyance of real property. ASHA also joined the California Assisted Living Association (CALA) this year in an Amicus letter to the California Supreme Court in a case (Harris v. University Village Thousand Oaks) in which a California Court of Appeal ruled that arbitration clauses in continuing care contracts are unenforceable because they violate a prohibition against such limitations on tenants' rights in residential rental agreements.

5. Research: Be a leading resource for the industry to provide credible knowledge and research promoting quality, innovation and differentiation across the age-qualified housing industry.

A major objective of the Strategic Plan called for ASHA to expand its research capacity and credibility by partnering with select universities. To that end, ASHA became a Founding Member of the Institute for Healthy Futures at Cornell University, the first academic center to combine hospitality, health policy management, and design. We also funded major research projects at Cornell University and at the University of Arizona Center on Aging, and provided significant financial support for the creation of the Granger Cobb Institute at Washington State University, the Erickson School at UMBC, and the Andrus Gerontology Center at USC.

ASHA also continued its longstanding tradition of producing a wide array of research for the industry over the five-year timeframe of the 2015 – 2020 Strategic Plan. Annual or recurring research studies produced by ASHA for the membership include the State of Seniors Housing, Seniors Housing State Regulatory Handbook, the ASHA 50 survey of the largest 50 owners and operators, and the Seniors Housing Statistical Handbook. ASHA has also produced two editions of the Seniors Housing Construction Monitor under a special licensing agreement with NIC.

ASHA additionally continued its robust research leadership through a range of innovative projects to help the industry better understand our customer, reduce move-outs, and improve overall operating performance. In concert with ProMatura, ASHA launched two groundbreaking studies that helped operators better understand factors that make assisted living and independent living communities “feel like home” (People, Place, Programming: Quality of Life in Assisted Living; Unlocking the Mystery Behind Very Satisfied Independent Living Customers: Make Them “Feel at Home”). Other ASHA research executed during the five-period of the 2015 -2020 Strategic Plan included: Taking Customer Service from Good to Great, 2017 Senior Living Technology Report, Seniors Housing Guide to Fair Housing and ADA Compliance, and Independent Living and Assisted Living Resident Profiles.

ASHA also utilized Special Issue Briefs with a number of thoughtful papers on a wide range of topics that include: The Evolving Healthcare System: Coordinated Care and Outcome Tracking

in Independent Living and Assisted Living; A Projection of U.S. Seniors Housing Demand 2015 – 2040; Digital Marketing Trends in Senior Living and Care; A New Look at an Aging Industry; Observations and Anecdotes from Inside the Federal Reserve; Driving Growth with Revenue Management; New Performance Metrics that Drive More Senior Living Sales – It's About Time; Management Companies and Fees: The Changing Dynamics between Ownership and Management; Seniors Housing Property Taxes: Managing Risks and Liabilities; Apartments for Life (A4L): Expanding Alternatives for Seniors; Redefining Marketing: Trends for the Next Generation of Active Aging; Seniors Housing Construction Costs; and Considerations for Balancing Seniors Housing Residents Safety as Communities Reopen: A Strategic Approach to the COVID-19 Pandemic.

A New Five-Year Strategic Plan

This past June, ASHA convened a Strategic Planning Committee to work on a new Strategic Plan for 2021 – 2026. Strategic Planning meetings have been facilitated by former ASHA Chairman, Philip Downey, and members of the Strategic Planning Committee 2021 - 2026 include:

Steve Blazejewski, PGIM Real Estate Investors

Colleen Blumenthal, HealthTrust

Doug Dollenberg, Brightview Senior Living

Jerry Frumm, Senior Lifestyle

Richard Hutchinson, Discovery Senior Living

Lynne Katzmann, Ph. D., Juniper Communities

Dana Scheppmann, Capital One

Doug Schiffer, Allegro Senior Living

Kathryn Sweeney, Blue Moon Capital

Ben Thompson, Senior Living Communities

Margaret Wylde, Ph. D., ProMatura