



**VISION**  
LTC

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# Unlocking Analytics in Senior Housing:

Improving Senior Housing Performance with Precision Analytics

May 2018

# By Operators for Operators

A Team of Industry Veterans with a Long Record of Success



**Arick  
Morton**



[linkedin.com/in/arickmorton](https://www.linkedin.com/in/arickmorton)

**Founder & leader of multiple health care IT start ups. 10+ years industry experience.**

- VP of Strategy, Navion Senior Solutions
  - Oversee all geospatial analysis & site selection
  - Oversee all financial analysis
  - Co-manage operational platform development
- Co-Founder, CareSolver
  - Developed caregiving platform for adult children of aging parents
  - Established strong relationships with health systems, hospitals, and senior housing providers
- Advisory Board Company
  - Developed & launched multiple business intelligence technology platforms
  - Developed & launched electronic medical device negotiation platform
  - Developed medium and long-range corporate strategy
- Advisor, Life2 Inc..
  - Senior Housing-Focused Provider of Predictive Analytics
- Advisor, K4Connect
  - Senior Housing-Focused Internet of Things Company
- Harvard Business School
  - Full-Time MBA Graduate



**Grant  
Hamm**



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**Founder & leader of multiple IT start ups. 10+ years geospatial industry experience.**

- CTO, Navion Senior Solutions
  - Oversee all IT systems & development
  - Oversee all geospatial tool development
- CDO, Castle World Wide
  - Leading electronic test administration company
  - Oversee all IT development
- Co-Founder, CareSolver
  - Developed caregiving platform for adult children of aging parents
  - Established strong relationships with health systems, hospitals, and senior housing providers
- Lead Programmer, aWhere, Inc.
  - Geospatial analysis specialist serving the nation's largest agribusiness firms
  - Oversaw the development of a robust geospatial analysis platform
- Advisor, K4Connect
  - Senior Housing-Focused Internet-of-Things Company
- Founder, IntelliGreen
  - Smart-home platform sold in 2005
  - Developed all systems & founded company



**Stephen  
Morton**



[linkedin.com/in/stmorton](https://www.linkedin.com/in/stmorton)

**Founder & CEO of multiple top 20 AL companies. 30+ years industry experience.**

- Turnaround CEO, Bell Senior Living
  - 32 AL Communities in 5 States
  - Successful Turnaround & Sale to Five Star Quality Care
- Co-Founder & COO, Southern Assisted Living
  - 43 AL Communities in 3 States
  - Largest AL Provider based in Southeast
  - Sold to Brookdale
- VP of Ops, Eastern US, Emeritus Inc.
  - 2nd Largest AL Operator in US
  - Full mgmt responsibility for Eastern US
  - Publicly Traded
- Co-Founder & CMO, Independent Living Club of America
- Board Member, Living Ventures Assisted Living
  - 31 AL Communities in 2 Countries
  - Publicly Traded
- Board Member, Life2 Inc.
  - Senior Housing-Focused Provider of Predictive Analytics
- Board Member, K4Connect
  - Senior Housing-Focused Internet of Things Company



**Steven  
Vick**









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**Founder & CEO of multiple public and private AL companies. 25+ years industry experience.**

- Founder & CEO, Signature Senior Living
  - 17 AL Communities
  - Privately Held
- CEO & Founder, Right Click Software
  - Sold to MatrixCare
- CEO, Assisted Living Concepts
  - 177 AL Communities in 14 States
  - Publicly Traded
- President & COO, Alterra Healthcare Inc.
  - 450 AL Communities, Largest in US
  - Publicly Traded
  - Now Brookdale Senior Living, World's Largest Senior Living Provider
- Co-Founder & President, Sterling House Corporation
  - 100 AL Communities
  - IPO in 1995
  - Merged with Alterra
- Past Chairman of the Board, Assisted Living Federation of America (ALFA)
- Chairman, Serene Senior Care PLC
  - Largest Senior Living Provider in India
- Board Member, American Senior Housing Association (ASHA)

# VisionLTC Portfolio-in-Brief

A Diverse Product Portfolio for the Senior Housing

 <b>Market Insight</b>	 <b>Pipeline Insight</b>	 <b>Referral Insight</b>	 <b>Resident Insight</b>	 <b>CarePrepare</b>	 <b>Industry Insight</b>
<b>KEY CAPABILITIES</b>					
<p>A Powerful Geospatial Analysis Platform that Assesses Market Conditions Nationwide.</p> <p>Supercharges Development, Acquisition, and Asset Management by Offering Detailed &amp; Customized Insight into Market Performance.</p>	<p>An Artificial Intelligence-Driven, Nationwide Pipeline Tracking Platform.</p> <p>Provides Real-Time Notification of Newly-Announced Developments Affording Maximum Time for Competitive Planning &amp; Response.</p>	<p>A Nationwide Database of 500,000 Referral Sources with Detailed Data About Each.</p> <p>Affords Superior Referral Source Outreach Performance Through Optimized Targeting, Prioritization, &amp; Messaging to High Impact Referral Sources.</p>	<p>A Powerful Platform that Profiles the Wealth &amp; Origin of Residents &amp; Next of Kin.</p> <p>Offers Unparalleled Insight Into Community Positioning, Effective Draw Area, &amp; Future Financial Performance to Improve Marketing &amp; Growth Efforts.</p>	<p>A Nationwide Database of State Survey Outcomes Delivering Clinical Benchmarking.</p> <p>Unlocks &amp; Benchmarks Survey Performance to Identify Operational Issues, Highlight Regulatory Trends, &amp; Sell-Against Competing Communities.</p>	<p>A Nationwide Database of 40,000+ Senior Housing Properties + Detailed Information.</p> <p>Provides In-Depth Detail About the Senior Housing Supply Stock Nationwide for Superior Targeting, Competitive Profiling, and Partner Identification.</p>
<b>KEY USERS</b>					
<p>Operators Investors/REITs Lenders Developers Other Stakeholders</p>	<p>Operators Investors/REITs Lenders Developers Vendors</p>	<p>Operators Developers</p>	<p>Operators Investors/REITs</p>	<p>Operators Investors/REITs Lenders Developers Other Stakeholders</p>	<p>Vendors Investors/REITs Lenders Operators</p>

# VisionLTC Market Insight

VisionLTC Data, Technology, & Analytics Deliver Precise Primary Market Insight

## 1 Define Target Location(s)



### Sample Target Location(s) & Market Areas

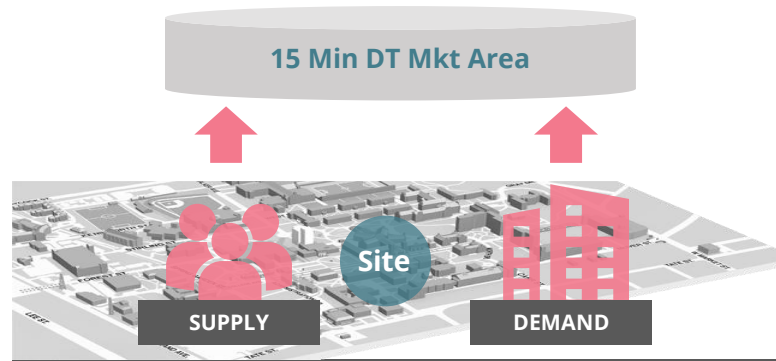
#### Sample Target Locations

- ❖ Nationwide Prospecting (210K Test Points / State)
- ❖ Existing Portfolio
- ❖ Acquisition Target
- ❖ Development Site
- ❖ Divestiture Prospect
- ❖ Investment Opportunity

#### Sample Market Areas

- ❖ X-Minute Drive Time
- ❖ X-Mile Buffer
- ❖ Custom Defined Market Area

## 2 Extract Raw Data



### Sample Raw Data

#### Demand Data

- ❖ Pop by Age & Gender
- ❖ Annual Income by Age
- ❖ Net Worth by Age
- ❖ Disp Income by Age
- ❖ Home Equity by Age
- ❖ Pensions & LTCI
- ❖ Acuity/Disease States
- ❖ Migration & Pop Growth
- ❖ Housing Market
- ❖ Labor Market
- ❖ Health Care Utilization
- ❖ Employment Market
- ❖ ETC

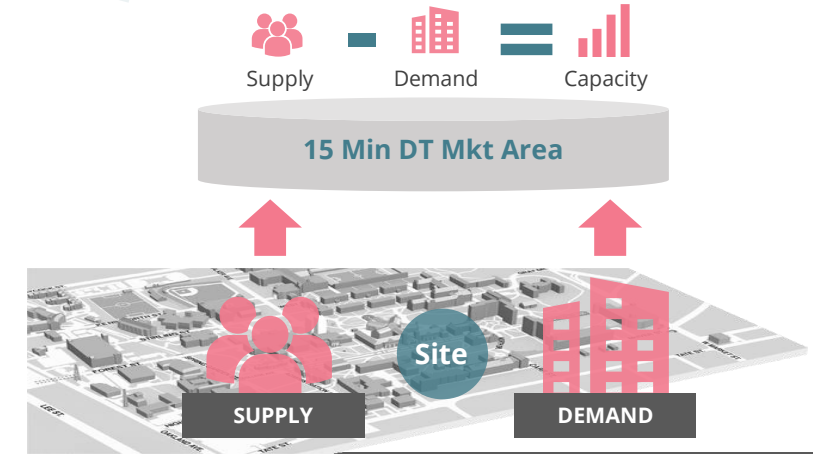
#### Nationwide Supply Data

- ❖ Bed Counts by Type
- ❖ Competition Age
- ❖ Operator Type
- ❖ Facility Type
- ❖ ETC

#### Referral Source Data

- ❖ Hospitals & NH
- ❖ Physician Procedures
- ❖ Traffic Counts
- ❖ 55+ Communities
- ❖ Adult Day/Home Care
- ❖ ETC.

## 3 Analyze + Benchmark

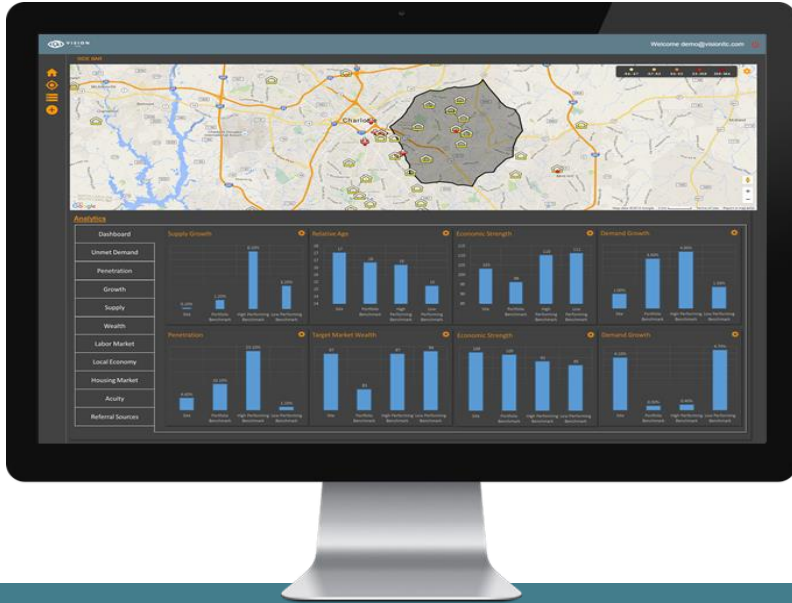


### Sample Customized Analytics

- Customized Benchmarking
- Unmet Demand / Penetration
- Demand Growth & Market Capacity
- Population Growth Trends
- Competition Characteristics
- Supply Growth
- Income Qualified Growth
- Wealth
- Acuity & Utilization
- Housing Market Trends
- Labor Market Trends
- Economic Trends
- Resident Net Worth
- ETC

# VisionLTC Market Insight

Delivering Precision Primary Market Analytics to the Senior Housing Industry



## VISION LTC -in-Brief

- ✓ A powerful geospatial market analysis tool custom-built for the senior housing industry.
- ✓ Gives operators, lenders, developers, & owners unparalleled, real-time insight into local market dynamics nationwide.
- ✓ Developed by operators who have developed & operated >750 buildings nationwide.
- ✓ Developed with leading market analysis experts at Harvard Business School & the Harvard Center for Geographic Analysis.
- ✓ Identifies areas of opportunity nationwide.



### Prospect for New Opportunities

Identify Optimal Primary Market Areas to Enter Via Development or Acquisition



### Monitor / Project Mkt Conditions

Monitor & Project Market Conditions Around Owned Assets & Tailor Community Strategy



### Evaluate Development Sites

Instantly Evaluate & Benchmark New Development Sites in Any Market Nationwide



### Gauge New Development Impact

Receive Alerts of New Construction & Gauge Impact of New Competition on Mkt Capacity



### Optimize Asset Management

Instantly Evaluate & Benchmark Your Current Portfolio to Optimize Asset Management Decision Making



### Evaluate Acquisition Opportunities

Evaluate Acquisition Opportunities in a Matter of Seconds



### Deep Dive Competition Nationwide

Assess Existing Supply Base - View Building Occupancy & Rate, Ownership, Financing, Building Features, etc.



### Assess Resident Draw Patterns

Visualize Resident Draw Patterns & Identify Untapped Pockets of Opportunity



### Explore Markets + Referral Sources

Visualize & Map Referral Sources, Competition, Employers, Population, & More



### Calculate Market Share

Load Competitive Surveys & Calculate Market Share & Community Positioning

# VisionLTC Pipeline Insight

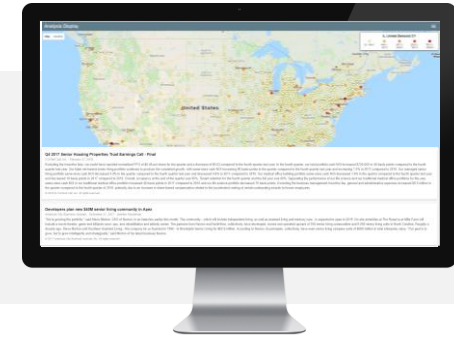
Leverage Artificial Intelligence to Track New Developments Nationwide



**30,000+ News Sources**



**VisionLTC Artificial Intelligence Engine**



**Nationwide New Development Pipeline Database**

## Pipeline Insight-in-Brief

- ✓ Powerful artificial intelligence & textual analysis engine analyzes 30k+ news sources to identify development projects in planning.
- ✓ Newly-announced projects are analyzed by deep learning text analysis engine to identify location & developer.
- ✓ Allows investors, lenders, operators, and developers to assess and monitor the threat of new development in real time.
- ✓ Allows senior housing industry vendors to identify new development projects years ahead of ground breaking.
- ✓ Offers full text access to 18k+ paywall-protected news sources.



### Assess Development Pipeline

Identify announced new development projects years ahead of groundbreaking in any market nationwide



### Track New Competitive Threats

Receive rapid notification and extensive detail of newly announced competitive threats around existing assets



### Accelerate Competitive Response

Streamline and accelerate response to newly announced competition by months or years



### Prospect for New Opportunities

Identify Optimal Primary Market Areas to Enter Via Development or Acquisition

# VisionLTC Referral Insight

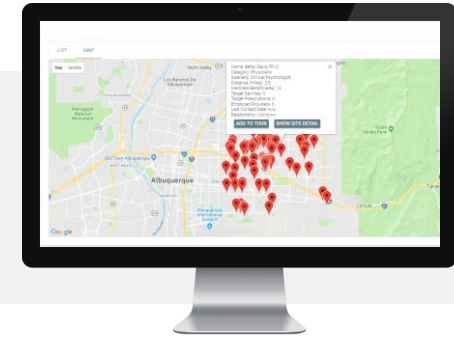
Identify, Prioritize, & Engage Professional Referral Sources Nationwide



**Target Locations**  
(Existing Communities, New Developments, etc.)



**Referral Insight Database of 500,000+ Referral Sources**



**Prioritized List of Key Referral Sources**

## Referral Insight-in-Brief

- ✓ Comprehensive database of 500k+ professional referral sources nationwide with deep detail on each referral sources.
- ✓ Referral sources range from physicians who write prescriptions for dementia medications to elder law attorneys.
- ✓ Convenient data and tools for prioritizing referral sources and tailoring outreach messaging.
- ✓ Analytics tools for assessing the impact of referral source outreach program.
- ✓ Available as bulk data export or within industry's first RSM tool.



### Identify All Referral Sources

Identify All Referral Sources from 25+ Categories Around New or Existing Communities



### Prioritize Referral Sources

Leverage Detailed Data on Each Referral Source to Prioritize Referral Source Outreach Efforts



### Tailor Referral Source Messaging

Leverage Detailed Data on Each Referral Source to Tailor Referral Source Messaging



### Optimize Referral Source Outreach

Create Referral Outreach Routes & Capture Referral Source Feedback to Optimize Staff Time Utilization

# VisionLTC Resident Insight

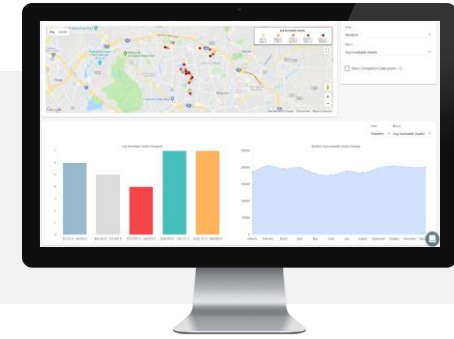
Profile Resident & Next of Kin Wealth & Origin to Supercharge Operational Performance & Growth



Rent Roll



Resident Insight  
WealthEngine



Resident & Next of Kin  
Wealth & Origin Profiles

## Resident Insight-in-Brief

- ✓ Evaluate residents and their next of kin on multiple wealth indicators – income, net worth, financial assets, etc.
- ✓ Determine location of resident/next of kin origin to map the effective market area of a given community.
- ✓ Track & trend resident and next of kin wealth over time as a leading indicator of future financial performance.
- ✓ Leverage resident wealth profiles for improving current marketing efforts & new developments and acquisitions.
- ✓ Leverage wealth and origin data for tactical marketing efforts.



### Profile Resident & NOK Wealth

Build a Profile of the Wealth, Income, and Financial Assets of Residents & Their Next of Kin



### Track Resident / NOK Wealth Trend

Trend the Wealth of Residents & Their Next of Kin to Determine Building Health & Competitive Positioning



### Visualize Resident Draw Patterns

Determine Effective Market Area by Mapping Resident Origin & Generate Key Insights for Marketing & Growth



### Leverage Wealth Profiles for Growth

Leverage Resident & Next of Kin Wealth Profiles to Evaluate Acquisition & New Development Opportunities



# CarePrepare

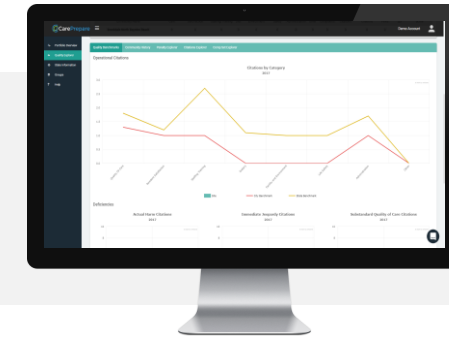
Leverage a Nationwide Survey Outcomes Database to Improve Operational Performance & Quantify Differentiation



**Nationwide State Survey Results**



**CarePrepare Quality Engine**



**Operational Quality Profiles**

## CarePrepare-in-Brief

- ✓ Rapidly growing standardized database of survey outcomes covering significant portion of the US.
- ✓ Evaluate a community's survey history in deep detail & compare its performance to its peer set.
- ✓ Evaluate executive director & resident care director performance over time to identify areas of weakness.
- ✓ Generate output benchmarking a community against its peers to share with referral sources and prospective residents.
- ✓ Track regulatory trends & take preemptive action.



### Benchmark Survey Performance

Deep Dive Survey Performance of Selected Community & Compare Performance to Its Peer Group



### Identify Areas of Quality Risk

Identify Areas of Underperformance & Latent Survey Risk & Take Preemptive Corrective Action



### Track Clinical & Regulatory Trends

Identify Areas of Regulatory Focus & Take Preemptive Action to Minimize the Risk of Adverse Survey Events

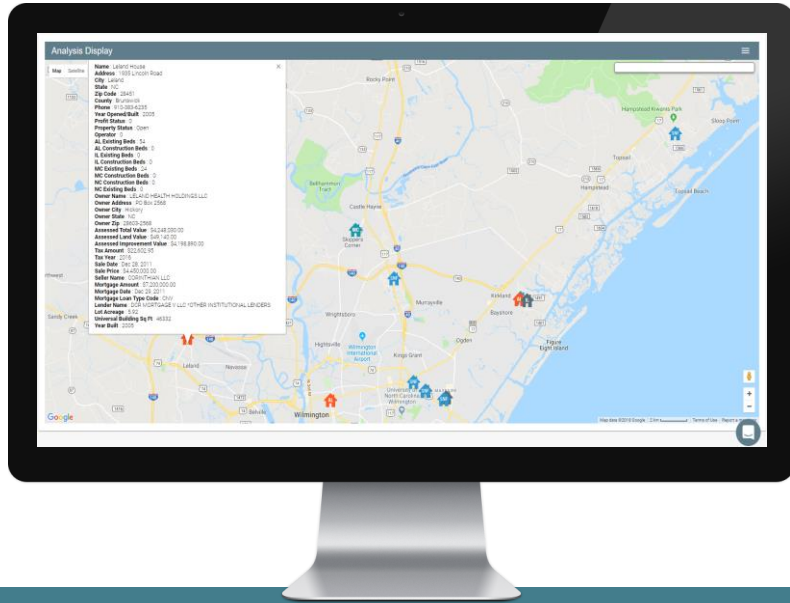


### Differentiate Via Superior Quality

Generate Collateral Benchmarking Your Community for Prospective Residents & Referral Sources

# VisionLTC Industry Insight

Explore the Senior Housing Industry Landscape Through the Industry's Only Nationwide Database



## Industry Insight-in-Brief

- ✓ Nationwide database of 40,000+ senior housing properties with extensive information regarding each property.
- ✓ Identify key details about each community including ownership, financing, operator, physical plant, transition history, etc.
- ✓ Track industry activity nationwide including operator growth, transactions, leadership turnover, new developments, etc.
- ✓ Evaluate potential partners in significant detail and determine in advance how best to partner.
- ✓ Nationwide coverage including areas beyond the top 150 MSAs.

## The Senior Housing Industry's Only Nationwide Database



### Nationwide Community Database

#### Selected Data Elements:

##### Contact Information

- ❖ Phone
- ❖ Website

##### Management Information

- ❖ Management Company

##### Size

- ❖ Licensed Beds
- ❖ Unit Count

##### Building Details

- ❖ Square Footage
- ❖ Building Size & Lot Size
- ❖ Select Building Characteristics

##### Ownership Details

- ❖ Owner
- ❖ Owner Address
- ❖ Purchase Date
- ❖ Purchase Price

##### Financing Details

- ❖ Loan Amount
- ❖ Lender
- ❖ Loan Maturity
- ❖ Tax Details
- ❖ Tax Payments
- ❖ Tax Basis



### Nationwide Operator Database

#### Selected Data Elements:

##### Contact Information

- ❖ Phone
- ❖ Website
- ❖ Key Leadership Name
- ❖ Key Leadership Email

##### Portfolio Characteristics

- ❖ Licensed Beds
- ❖ Property Count
- ❖ Geographic Concentration

##### Activity Details

- ❖ Growth & Transactions
- ❖ Asset Dispositions
- Partnerships
- ❖ Lending Relationships
- ❖ Ownership Relationships



### Nationwide Pipeline Database

#### Selected Data Elements:

- ❖ Nationwide database of developments in planning
- ❖ Notification of new developments as they are announced
- ❖ Full text access to details of newly announced development including unit mix, developer, timelines, financing and operating partners, etc.