



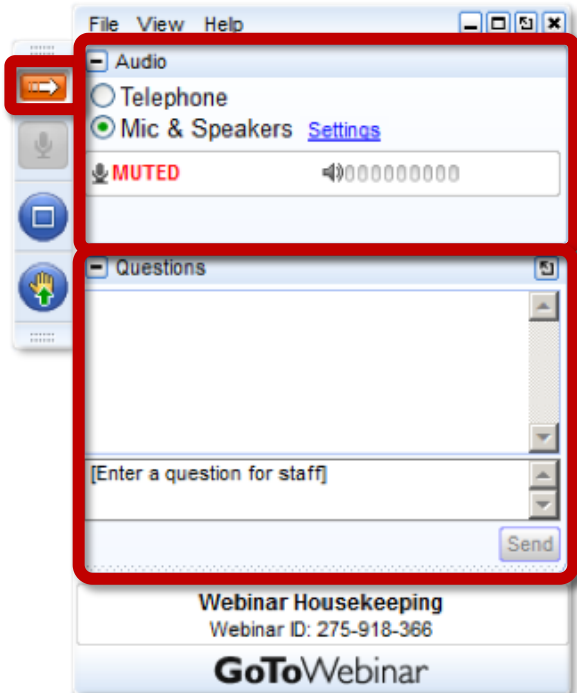
VISION
LTC

Using Incidence Analytics to Identify Market Need

Improving Senior Housing Performance with
Precision Market Analytics

January 2018

Welcome!



Your Participation

Open and close your control panel

Join audio:

- Choose **Mic & Speakers** to use VoIP
- Choose **Telephone** and dial using the information provided

Submit questions and comments via the Questions panel

Note: Today's presentation is being recorded and will be provided within 48 hours.

An Experienced Team of Senior Housing Operators

A Team of Experienced Leaders & Content Experts

Arick Morton - CEO



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

- CEO, VisionLTC
 - Develop & implement corporate strategy
 - Create innovative performance improvement solutions for the senior housing industry
- VP of Strategy, Navion Senior Living
 - Oversee all geospatial analysis & site selection
 - Oversee all financial analysis
 - Co-manage operational platform development
- 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

amorton@visionltc.com

Kyle Gardner – VP of Analytics



Experienced finance & analytical background with an enthusiasm for health care.

- Vice President of Analytics, VisionLTC
 - Head of Operations and Client Delivery
 - Assist clients with research projects, data collection and analysis
 - Develop systems, reports, and processes for market analysis and resident prospecting
 - Identify, collect and curate datasets for use in Senior Housing research and analysis
- 4+ Years in Commercial Banking & Investor Relations
 - Underwrote commercial and R/E loans
 - Conducted statistical analyses on Bank's asset base and customer base to project P&L performance
 - Analyzed financials and company performance to determine relative valuations of publicly traded firms
- Luter School of Business, Christopher Newport University
 - BSBA – Finance Graduate
- CFA Institute
 - Passed Level 1 of CFA Exam

kgardner@visionltc.com

VisionLTC Overview

Delivering Precision Primary Market Analytics to the Senior Housing Industry



-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

Gauge New Development Impact



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

Evaluate Entire Portfolios



Instantly Evaluate & Benchmark New Development Sites

Assess Prospect Ability-to-Pay



Assess Prospective Resident Ability to Pay & Gain Critical Insight to Drive Conversion

Assess Rate Increase Potential



Assess Potential for Rate Increases Based on Resident Financial Health & Mkt Capacity

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

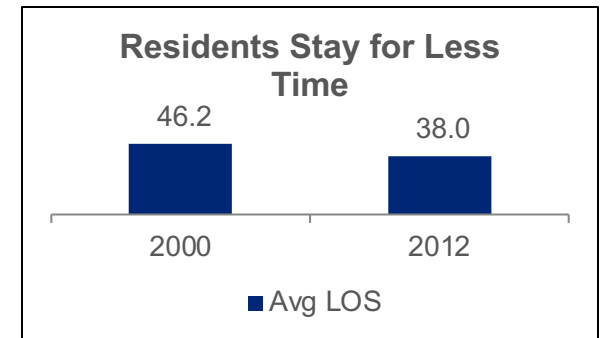
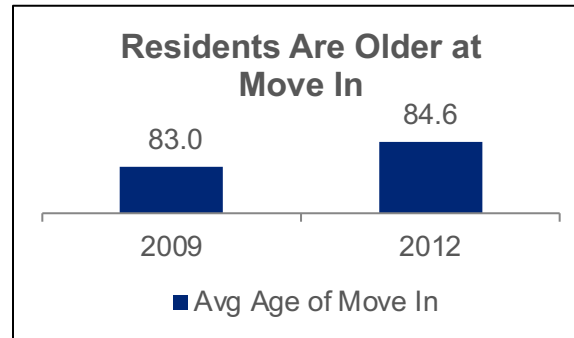
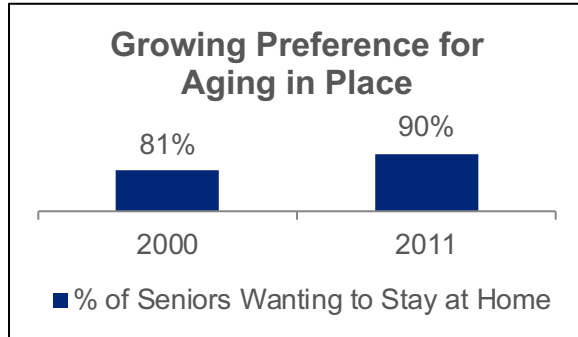


Load Competitive Surveys & Calculate Market Share & Community Positioning

Why Incidence Analysis Matters

Senior Housing is Becoming More Need Driven

Senior Housing Demand Increasingly Generated by Care Needs



➤ Accurately Assessing Market Need Critical to Successful Market Evaluation

How Can We Measure Need?

Key Incidence Data Sets & Measures

Key Incidence Data Sets

Cognitive Impairment Rates



- Measure: Disability in cognitive function in the 75+ population
- Source: American Community Survey
- Geographic Resolution: Census Tract Level



Dementia Prescriptions



- Measure: # of Medicare Beneficiaries Receiving a Medication for Dementia
- Source: CMS
- Geographic Resolution: Prescriber Level



Activities of Daily Living Disability Rates



- Measure: Disability in ADL function in the 75+ population
- Source: American Community Survey
- Geographic Resolution: Census Tract Level



Instrumental Activities of Daily Living Disability Rates



- Measure: Disability in IADL function in the 75+ population
- Source: American Community Survey
- Geographic Resolution: Census Tract Level



Key Incidence Measures

Cognitively Impaired Population Per MC Bed



- Number of cognitively impaired seniors per memory care bed in the market area

Dementia Beneficiaries Per MC Bed



- Number of seniors receiving a medication for dementia per memory care bed in the market area

ADL Disabled Population Per AL Bed



- Number of ADL disabled seniors per assisted living bed in the market area

IADL Impaired Population Per AL Bed

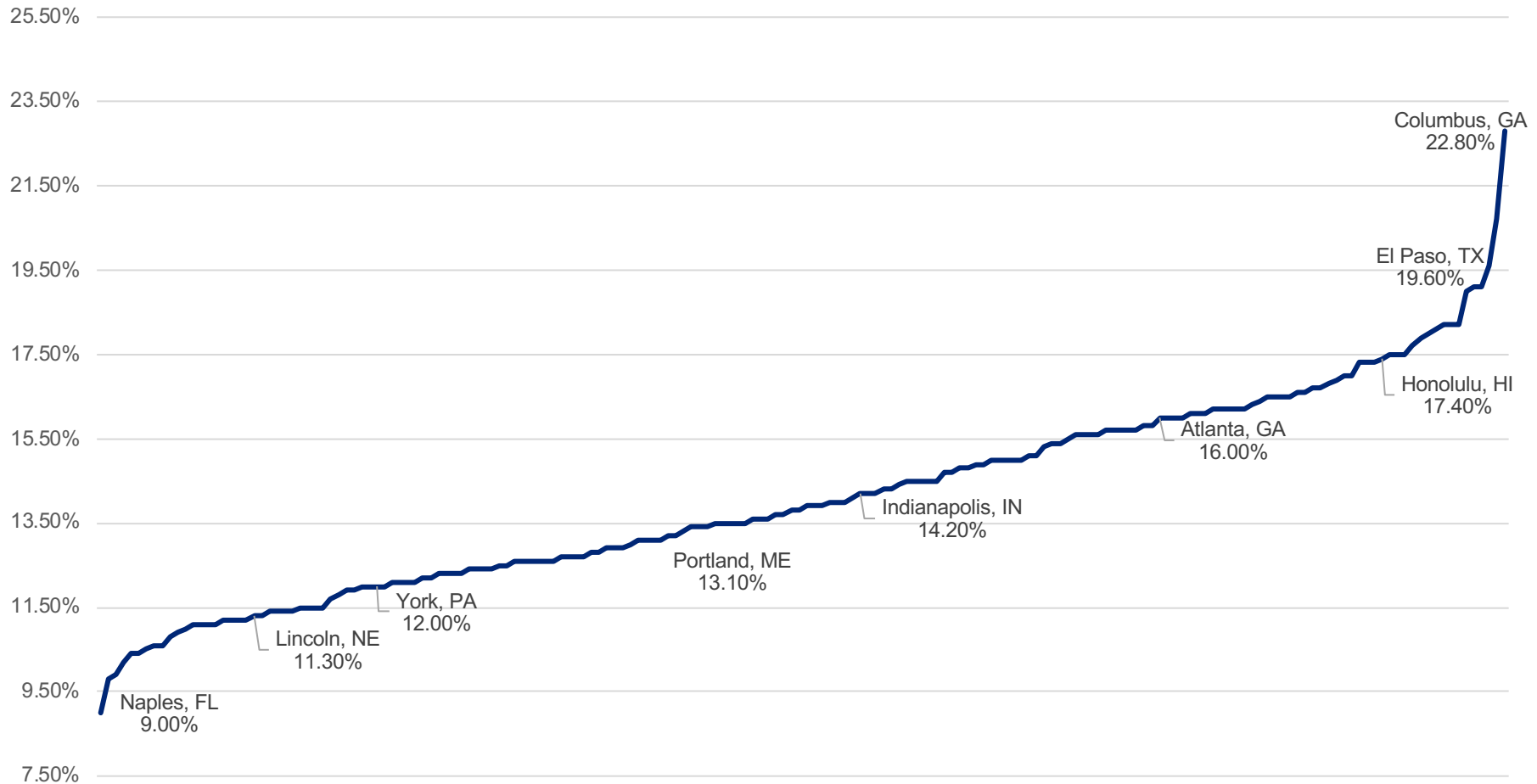


- Number of IADL disabled seniors per assisted living bed in the market area

➤ High Resolution Incidence Data Exists To Evaluate Market Need

Memory Care Need Incidence Varies Widely

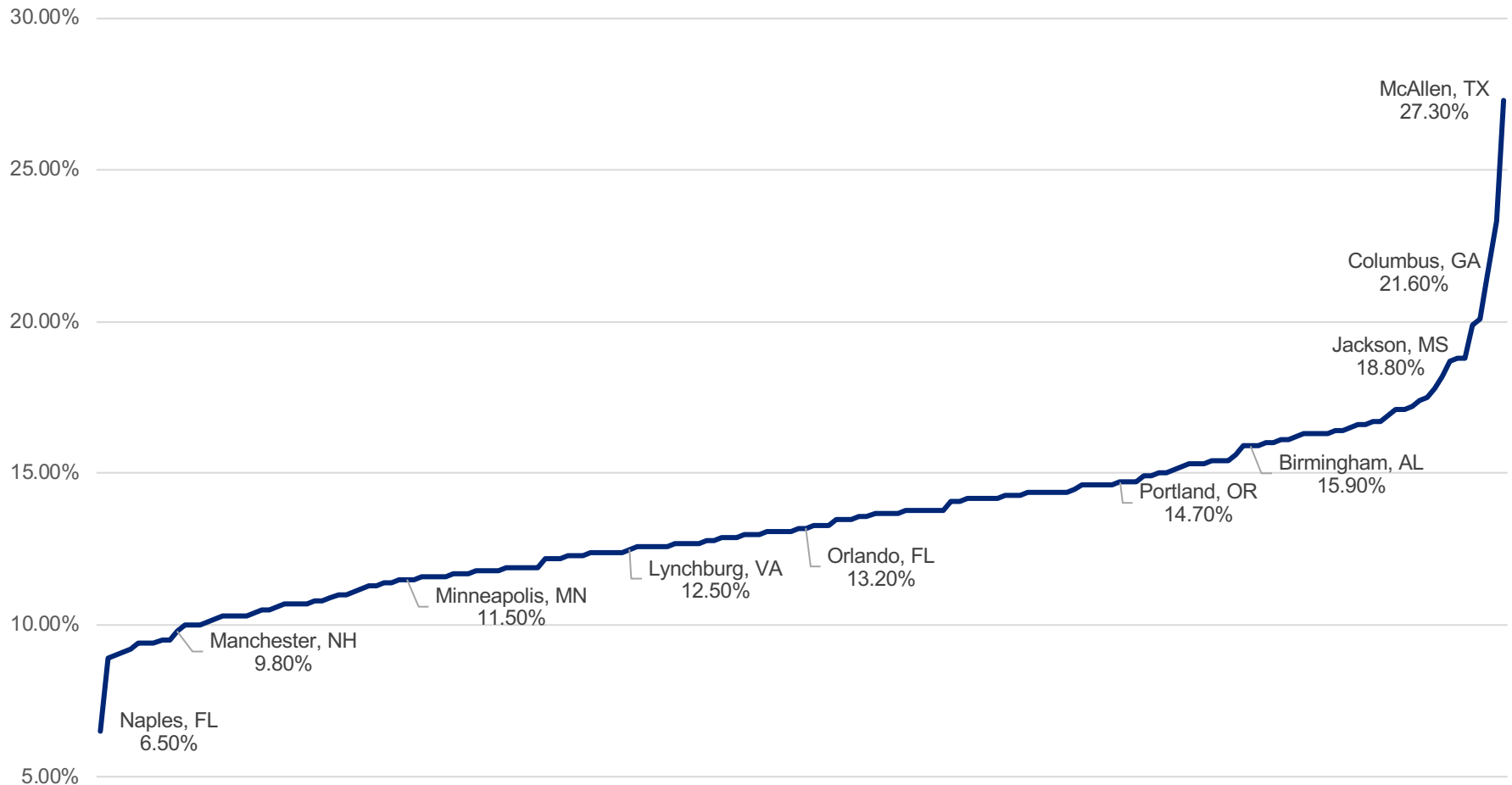
75+ Cognitive Impairment Rate



➤ Successful Market Evaluation Requires Market Level Need Evaluation

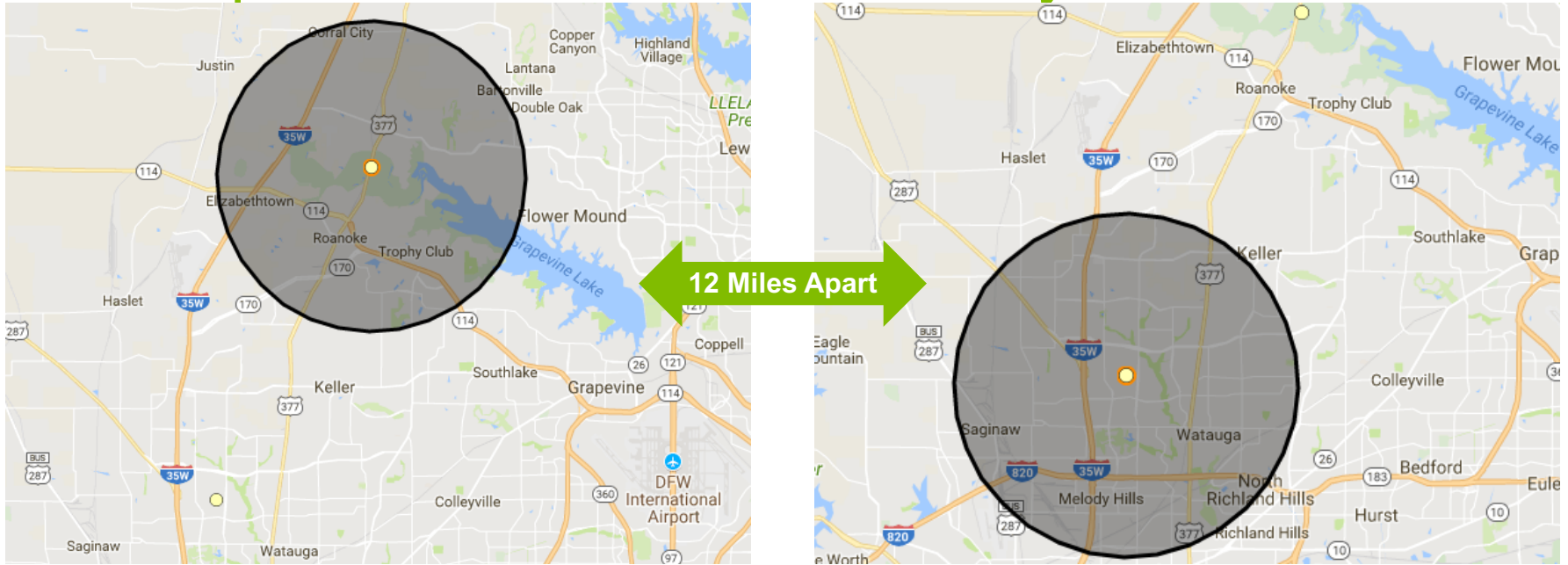
Personal Care Need Incidence Varies Widely

75+ Activities of Daily Living Disability Rate



➤ Successful Market Evaluation Requires Market Level Need Evaluation

The Importance of PMA Level Analysis



Roanoke Site	North Fort Worth Site
<u>Cognitive Impairment Rate</u>	
10.1%	20.8%
<u>ADL Disability Rate</u>	
9.7%	21.7%
<u>Number of Seniors Receiving Dementia Prescription</u>	
10	204
<u>IADL Disability Rate</u>	
11.8%	32.6%

➤ Incidence Rates Vary Widely Within Metros, Making PMA-Level Analysis Key

Questions? Want to setup a customized demo for your team?

Click here <http://bit.ly/VisionLTC> for more information and additional resources. Senior Living SMART members receive 50% off the first month of services provided by our partner, VisionLTC.

