

# NOVARE<sup>e</sup>®

Celebrating 10 Years

of innovation, collaboration,  
and excellence

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## Three Cheers to 10 Years

It's hard to believe it's been a decade since Novare began as an idea to bring single-site and small-system senior living providers together. Now, 10 years later, we have grown into a strong and vibrant consortium made up of 20 high quality not-for-profit organizations located in non-competing markets across the nation.

Equivalent in size to the nation's third largest, multi-site not-for-profit senior living provider, our Membership comprises 27 communities in 19 states, with 9,375 units.

Every year brings new accomplishments, collaborations, and idea-sharing. We've explored "best in class" wellness programs, initiated development of an Information Technology Strategic Plan to meet member needs, and participated in research opportunities in collaboration with Mather Institute. (The longitudinal Age Well Study with Northwestern University and a Resident Wellness Coaching Program with Virginia Tech and Wake Forest University come to mind.)

We've come so far, and broken so much new ground... and there are many more innovative ideas to pursue!



Sincerely,  
*Mary Leary*  
Mary Leary  
*Novare Chair*

# Novare Members



# Mission & Overview

## Our Mission

to accelerate member potential through peer-inspiring, collaborative leadership in order to enhance the lives of older adults.

Since our inception, Novare has achieved the following in support of our Members:

### Operational Initiatives

- developed operational benchmarking to strengthen day-to-day capabilities
- supported 13 Novare Subgroups, providing opportunities for collaboration across organization departments, and launched a “Subgroup Chair” program to help grow industry leaders
- launched a Novare job posting initiative, promoting growth across Member organizations
- developed two staff development programs: the Leadership Development Program and Management Essentials Program
  - Over six years, 32% of LDP graduates have been promoted to roles of greater responsibility at their own organizations
- established vendor discount opportunities, allowing members to save up to 20% on supplies and services
- shared Signature Programs among Members, offering opportunities for replication and alignment of quality programs across Novare
- implementation of Novare Resident and Employee Engagement and Satisfaction Surveys
- launched a Novare website to strengthen brand visibility

## NOVARE BY THE NUMBERS

*Inception through 2022*

**23**

Peer Leadership Exchanges held

**18**

CEO Forums held

**14**

Peer Leadership Subgroup Chairs

**13**

Peer Leadership Subgroups meet regularly via videoconference

**9**

Member Signature Programs published

**8**

Annual Resident/Employee Engagement and Satisfaction Surveys conducted

**6**

Year-long Leadership Development Programs completed

**3**

Year-long Management Essentials Program completed

## 2022 Year In Review

2022 was a blockbuster year for Novare in terms of accomplishments, which included:

### Signature Programs

Members shared a “signature” program from their community that offers replication potential across Members, creating an opportunity for alignment of quality programs across Novare. A variety of programs were shared relating to “creative aging”, going beyond arts and crafts to weave creativity, and programs that impact the lives of residents and staff, including wellness assessments, career ladders, and recruitment.

### Employee Engagement and Satisfaction Survey

The Novare Employee Benchmark includes responses from more than 2,500 employees across 13 organizations. Among respondents:

- 93% feel their organization provides good services to older adults
- 92% feel they make a difference in the lives of people in their work
- 89% agree that their organization is a good place to work

### CEO Forums

The **Spring Forum** was hosted at Splendido, a Mather residence in Tucson, and **Fall Forum** was hosted by Kāhala Nui in Honolulu. CEOs enjoyed the opportunity to develop skills that build resilience in leaders and managers, brainstorm the future of wellness in senior living, discuss emerging technologies, and confirming a strategy for Novare from 2023–2025.



*CEO Spring Forum 2022*



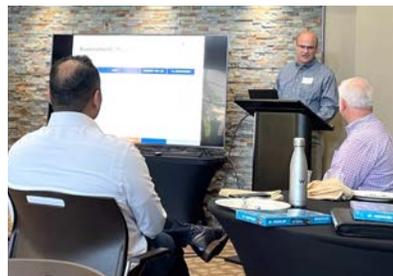
*CEO Fall Forum 2022*

## Peer Exchanges

- **A Novare Finance Exchange** took place in April prior to the Ziegler LeadingAge National CFO Workshop in New Orleans. Participants discussed operational structure and tools, paperless environments, Covid-19 funding opportunities, and foundations.
- **A Novare Human Resources Exchange** took place in May hosted by Frasier in Boulder. Participants discussed employee recruitment and retention, developing an immigrant worker program, diversity and inclusion, and increasing employee engagement through connection and coaching.
- **A Novare Information Technology Exchange** took place in August hosted by Masonic Homes Kentucky in Louisville. Participants discussed resident support strategies, brainstorming the future of senior living technology, business continuity and disaster recovery, and toured Thrive Center, which creates an interactive, hands-on experience of technology, innovation, and educational programs supported by Thrive Alliance.
- **A Novare Operations Exchange** took place in October following LeadingAge Conference and Expo hosted by Frasier in Boulder, CO. Participants discussed benchmarking, Frasier's affiliation with Boulder Museum of Contemporary Art, and challenges in a post-pandemic world.



*Finance Exchange 2022*



*Information Technology Exchange 2022*



*Human Resources Exchange 2022*

## Nurturing Leaders

- **14 participants graduated from the sixth annual Leadership Development Program** in October 2022 at Mather in Evanston, Illinois. The program provides participants the opportunity to significantly develop their leadership brand and competencies to gain insight and real-life experience for leading within Novare and the senior living industry.
- **A Novare Management Essentials Program took place April through September 2022.** New managers or managers new to the organization had the opportunity to obtain knowledge, skills, and behaviors required for managing employees in an operational area/department. More than 400 participants have graduated from the Management Essentials Program since 2020.
- **14 Members accepted a role as Novare Subgroup Chair,** a one-year opportunity providing recognition as a Novare leader. Subgroup Chairs are chosen based on CEO recommendation, degree of subgroup participation, and experience. The Novare Subgroup Chair is an excellent opportunity to learn, develop, and practice skills that can be applied to their role and the industry. As Subgroup Chair, Members achieve industry leadership experience and recognition as a Novare leader.



*6th Annual Leadership Development Program 2022*

## 2022 Member Accomplishments

### Bishop Gadsden



Bishop Gadsden opened Gadsden Glen Center for Health and Rehab, offering memory support, short-term, and long-term health care in a light-filled, nature- and art-infused hospitality environment. An expansion of Myers Hall Assisted Living opened shortly afterward, featuring 24 new one- and two-bedroom apartments and renovated common spaces. The Shared Future Campaign supporting these projects closed well over goal at \$7.65M.

Marketing launched on a new 15-residence independent living neighborhood, The Meade, comprised of three “mini-hybrid” Charleston-style buildings, each with five spacious flats ranging from 1,850 to 2,400 square feet. All flats were presold with a waiting list by year-end. Bishop Gadsden also launched Embark, a new Early Advantage program to provide amenities and life care access to members.

### Blakeford Senior Life

Throughout 2022, construction continued on Blakeford’s expansion and renovation project. New independent living dining venues and a new therapy space were completed. In October, we opened our new memory care neighborhood. The beautiful living spaces and outdoor gardens have been well received by families and fill-up has been steady. We also introduced a new resident engagement platform to our independent living residents. Adoption has been strong and we are very pleased with the results.



Another exciting development was the extension of our continuing care at home program, LiveWell by Blakeford, into Sewanee, Tennessee, a community two hours south of Nashville.

Finally, Blakeford was voted “Best Senior Living” in a reader’s poll taken by Nashville Scene.

## ClarkLindsey



ClarkLindsey spent the pandemic planning for a major campus positioning and in 2022, it completed its first phase of new construction, welcoming residents to eight new villa homes. In that same year, the second phase of construction related to a new assisted living building began. When it opens in early 2024, the ClarkLindsey campus will have grown to include 64 new apartments providing memory care and classic assisted living services.

In 2022, we also celebrated a return to our full wellness center programming that includes almost 200 community members who participate in fitness programming throughout the week. ClarkLindsey's atHome nursing and private duty business, which launched in 2019, continued to grow to serve residents on campus and beyond, extending the continuum of services.

Programmatically, 2022 saw significant growth in resident-led education and community outreach programs that deepen our understanding and appreciation of diversity and strengthens our community's commitment to inclusion and equity.

## Frasier

Frasier completed a \$100+ million expansion in early 2020, which included The Prairies, a 98-unit apartment building for independent living—built to WELL standards. Due to delays caused by the pandemic,



The Prairies was awarded a Gold Level WELL Standard certification in May 2022, making Frasier one of the first senior living communities to achieve this. Other notable accomplishments include building of two



new music studios and a new art studio, as well as completely refurbishing our Chapel. We received a generous gift of \$100,000 and an incredible collection of art created by resident Olga Plam, which enabled us to christen the Misha and Olga Plam Conference Room. Part of Olga's art collection adorns the conference room walls. We also continue with our partnership with the Boulder Museum of Contemporary Art, which began in early 2020. BMoCA curates contemporary art and facilities exhibitions in The Canyons Center Gallery at Frasier three times a year.

## Immanuel Lutheran Communities



Immanuel Lutheran Communities completed phases 1 and 2 of its Cottages project, adding 4 new Independent Living patio-homes to its 13-acre campus. Immanuel also continues to update the East Wing of our Immanuel Skilled Care Center.

Immanuel's wholly-owned subsidiary, Immanuel Living, which was launched in 2020 to support property development and third-party management initiatives continues to gain traction across the state of Montana.

Immanuel at Home was launched in January 2022 after Immanuel received a \$700,000 grant from Lutheran Services in America.

Immanuel opened a new childcare center called Growing Roots Early Learning Center in a temporary location with plans to open the permanent location in late 2023 using ARPA dollars.

## Kahala Nui



In the spirit of 'Ohana (family), Kāhala Nui is committed to enhancing the lives of our Kūpuna (seniors). Our Social Accountability Program (SAP) is our way of carrying out our mission to serve the unmet



needs of seniors in Hawai'i. Each year, Kāhala Nui partners with six charitable organizations that provide monetary and in-kind support to the community. The total amount contributed in 2022 was over \$1.1 million.

Kāhala Nui also completed a kitchen and dining room renovation/expansion project with a new Casual Dining/Gather & Go area, beverage station, bistro featuring a wine bar and an expanded kitchen, as well as began renovations to our assisted living apartments.

## Lambeth House



2022 was laced with restoration and triumph for Lambeth House. As the organization emerged from pandemic woes, Lambeth House was able to maintain census levels in assisted living at or above industry benchmarks, while maintaining census in independent living and nursing care that were well above national benchmarks according to NIC! Constraints on admissions were then, and are now, solely due to staffing challenges. Additionally, Lambeth House conducted its first Employment Engagement and Satisfaction Survey. Lambeth House's score for Overall Engagement and Overall Satisfaction exceeded Novare benchmarks in all sectors and offered excellent insight into areas of improvement. Lambeth House reflects on 2022 with renewed perspective and an innovative plan for 2023.

## The Legacy Senior Communities



The Legacy Senior Communities had a very busy 2022. The Legacy worked towards reaching stabilization at our Midtown Park community after opening in the midst of the Covid-19 pandemic. Legacy Willow Bend community returned to pre-pandemic levels and Legacy At Home continued to grow in all service lines.



The Legacy turned toward innovative technology in our health care centers and memory support by providing smart toilets. This offers a proactive approach to health care to identify and treat abnormalities sooner, avoiding hospitalization. We partnered with renowned gerontologist Tam Cummings for Dementia Aware education. We enhanced our Onsite Wellness Clinics for both residents and team members, as well as added physicians and partnered with specialists. The Legacy also created CHARM, our culture and hospitality initiative driving home our mission and values.

## Lenbrook



For so many people and organizations, 2022 was a pivotal year to understand where we have been, currently are, and where we're going. Fortunately for Lenbrook, our community was positioned well coming into the pandemic to weather the storm. We were also fortunate to have our Kingsboro at Lenbrook project underway. The Kingsboro at Lenbrook project finished on time, ahead of budget, and with a quality level that makes us proud.

During 2022, we moved over 100 new families into Lenbrook, re-enforcing our strong market position, held onto our high-quality standards, and continued to provide growth and advancement opportunities for our existing purpose-driven associates while recruiting new associates to join our community.

With our Novare members, we look forward to the future.

## Masonic Homes Kentucky



Masonic Homes Kentucky is uniquely prepared for pending changes to regulations around assisted living and personal care. This year, it has restructured the accommodations on its Louisville Campus to create more personal care rooms at Crescent Grove Personal & Memory Care

and it has continued to make improvements to Pillars Assisted Living & Personal Care in Shelbyville, a community recently named Best in Kentucky. Masonic is repositioning a historic building on its park-like campus to become a small, boutique independent living community, Clay. This project coincides with the reconstruction of a community common area and dining venue to offer individual and family portioned heat-and-eat gourmet meals and a new recreation center featuring pickle ball courts.

## Mather



Mather “reached great heights” in 2022, achieving 83% pre-sold for The Mather, a residence opening in 2024 in Tysons, Virginia. Mather awarded \$500,000 to the AUX, a wellness hub dedicated to advancing racial equity through support of Black-owned businesses. Mather Institute completed the final year of a five-year longitudinal Age Well Study.

Recognition:

- Nation’s Best and Brightest in Wellness
- McKnight’s inaugural “Agent of Change” Pinnacle Award: setting new standards, driving change, and inspiring others
- ICAA Pinnacle Award: one of the top five Wellness CEOs in senior living in North America
- Two ICAA Beacon Awards: Splendido as best in wellness, The Mather as one of the best in wellness
- Best Senior Housing Community on the Boards: The Mather Tysons

## Monterea

2022 saw many significant changes and improvements at Monterea. A focus on recruitment afforded many high-quality individuals to enter the organization. An emphasis on continuous learning and improvement saw the organization introduce new technologies to increase our capabilities within our health care, finance, and business offices.

We introduced our 5 Fundamental Pillars for success dovetailed with the introduction of our SIPSE programming to support the increased service standards demanded throughout the community. Additionally, the creation of numerous joint ventures throughout the region was implemented.

The centralization of our service delivery model has enhanced both our resident service capacity and improved communication between departments. We have also expanded our cultural onboarding programs that touch new hires multiple times throughout their employment.



## Moorings Park



- Resident satisfaction monitored via Qualtrics through six surveys, all of which achieved targeted top box scores
- Grande Lake in top 5 “Best in Wellness” for the ICAA NuStep Beacon Award
- 189 Wellness Assessments completed, program being re-evaluated to include all residents in physician’s practice
- Home Health Agency re-accredited for CHAP
- Received the ‘Great Place to Work’ certification for the second year

- First year participating in H2-B visa program
- Moorings Park Foundation raised over \$2.2 million, \$600,000 contributed to the community through grants
- Entered into joint venture with K2 Developers, LLC to renovate a hotel for workforce housing
- Maintained A+ rating with S&P and A rating with Fitch
- Grande Lake continues to grow – 120 operational residences

## The Osborn



The Osborn Pavilion short-stay rehabilitation center was again named one of New York’s top performing nursing homes by U.S. News & World Report in 2022. “We are delighted once again to receive this

designation by U.S. News & World Report. This recognition affirms our commitment to quality and compassionate care for all our residents,” said Matt Anderson, President and CEO.

The Osborn’s WellSpring Initiative for engagement, enrichment, and lifelong learning further expanded during 2022 with additional resident-led programs, professor-led lectures with Manhattanville College, and dance and musical performances on The Osborn’s Broadway-style stage.

## Saint John's On The Lake



2022 saw a return to normalcy post-COVID and construction. Residents embraced the opportunity to connect, again enjoying life in community. Those who moved to the new North Tower during the pandemic began to realize and appreciate Saint John's lifestyle. Care neighborhood occupancy rebounded, and employee retention has begun to improve.

The Symposium on Aging, our signature community outreach initiative, returned with record attendance by aging service professionals from southeast Wisconsin. How refreshing to resume our focus on our core mission and re-engage with stakeholders in person!

## Vicar's Landing

In 2022, Vicar's Landing opened phase one of Vicar's Landing at Oak Bridge, a new campus. Phase one consists of 43 cottage homes and 66 apartment homes, with the campus offering extensive walking paths under ancient oak trees



along a seven-acre lake. A beautiful clubhouse offering dining, fitness, activities, salon, and more. Future phases will add an additional independent living homes and 60 assisted living homes, including 18 memory care apartments.



Work began on a Master Plan for the Vicar's Landing at Sawgrass campus, reimagining spaces and land use to meet the needs of future generations.

To meet the operational demands of our expansion, we welcomed a new Executive Director to oversee day-to-day operations and a Director of Health Services to expand health care offering. These changes set Vicar's Landing up for a bright future providing exceptional service to residents in Ponte Vedra Beach, Florida!

# Waverly Heights



Waverly Heights completed a significant Healthcare Center repositioning project resulting in a decreased number of skilled nursing rooms and an increased number of personal care and memory support suites.

Waverly expanded its service line by acquiring a Care Management company providing services in clients' homes.

Waverly implemented a variety of scholarship and tuition reimbursement initiatives to address staffing challenges and reaffirmed its Fitch A-rating and continues to be strong in other key financial metrics, including Days Cash-on-Hand and Debt Service Coverage Ratios.

The community successfully managed a record-setting number of 56 residential living turnovers, all of which were placed under contract except for two apartments.

## 2022 Novare Governance Committee



**Mary Leary**  
Chair  
*President and CEO,  
Mather*



**Dan Lavender**  
Vice Chair  
CEO,  
*Moorings Park*



**Deb Reardanz**  
Interim Treasurer  
*President & CEO,  
ClarkLindsey*



**Jason Cronk**  
Secretary  
CEO, *Immanuel  
Lutheran Communities*



**Kevin McLeod**  
At-Large  
*President/CEO,  
Carolina Meadows*

# Novare Member Directory

## **Aldersgate**

3800 Shamrock Drive  
Charlotte, NC 28215  
[aldersgateliving.org](http://aldersgateliving.org)

## **Bishop Gadsden**

1 Bishop Gadsden Way  
Charleston, SC 29412  
[bishopgadsden.org](http://bishopgadsden.org)

## **Blakeford at Green Hills**

11 Burton Hills Blvd.  
Nashville, TN 37215  
[blakeford.com/greenhills](http://blakeford.com/greenhills)

## **Carolina Meadows, Inc.**

100 Carolina Meadows  
Chapel Hill, NC 27517  
[carolinameadows.org](http://carolinameadows.org)

## **ClarkLindsey**

101 West Windsor Road  
Urbana, IL 61802  
[clarklindsey.com](http://clarklindsey.com)

## **Duncaster**

40 Loeffler Rd  
Bloomfield, CT 06002  
[duncaster.org](http://duncaster.org)

## **Frasier**

350 Ponca Place  
Boulder, CO 80303  
[frasiermeadows.org](http://frasiermeadows.org)

## **Immanuel Lutheran Communities**

185 Crestline Ave.  
Kalispell, MT 59901  
[ilcorp.org](http://ilcorp.org)

## **Kāhala Nui**

4389 Malia St.  
Honolulu, HI 96821  
[kahalanui.com](http://kahalanui.com)

## **Lambeth House**

150 Broadway  
New Orleans, LA 70118  
[lambethhouse.com](http://lambethhouse.com)

## **The Legacy Midtown Park**

8240 Manderville Lane  
Dallas, TX 75231  
[thelegacyseniorcommunities.org/legacymidtownpark](http://thelegacyseniorcommunities.org/legacymidtownpark)

## **The Legacy Willow Bend**

6101 Ohio Drive  
Plano, TX 75024  
[thelegacyseniorcommunities.org/legacywillowbend](http://thelegacyseniorcommunities.org/legacywillowbend)

## **Lenbrook**

3747 Peachtree Road, NE  
Atlanta, GA 30319  
[lenbrook-atlanta.org](http://lenbrook-atlanta.org)

## **Masonic Homes Kentucky, Louisville Campus**

330 Masonic Home Drive  
Masonic Home, KY 40041  
[masonichomesky.com/locations/louisville](http://masonichomesky.com/locations/louisville)

## **Masonic Homes Kentucky, Shelbyville Campus**

711 Frankfort Road  
Shelbyville, KY 40065  
[masonichomesky.com/locations/shelbyville](http://masonichomesky.com/locations/shelbyville)

## **Masonic Homes Kentucky, Spring Hill Village**

700 Taylorspring Court  
Taylor Mill, KY 41015  
[masonichomesky.com/locations/northern-kentucky](http://masonichomesky.com/locations/northern-kentucky)

## **The Mather, Evanston**

425 Davis Street  
Evanston, IL 60201  
[thematherevanston.com](http://thematherevanston.com)

## **Splendido**

13500 N. Rancho Vistoso Blvd  
Tucson, AZ 85755  
[splendidotucson.com](http://splendidotucson.com)

## **The Mather, Tysons**

(projected for 2023)  
7929 Westpark Drive  
Tysons, VA 22102  
[themathertysons.com](http://themathertysons.com)

## **Mather Place**

2801 Old Glenview Road  
Wilmette, IL 60091  
[matherplacewilmette.com](http://matherplacewilmette.com)

## **Montereau**

6800 South Granite Avenue  
Tulsa, OK 74136  
[montereau.net](http://montereau.net)

## **Moorings Park**

120 Moorings Park Dr.  
Naples, FL 34105  
[mooringspark.org/](http://mooringspark.org/)  
[moorings-park](http://moorings-park)

## **Moorings Park Grande Lake**

7410 Little Lane  
Naples, FL 34105  
[mooringspark.org/](http://mooringspark.org/)  
[moorings-park-grande-lake](http://moorings-park-grande-lake)

## **Moorings Park at Grey Oaks**

2591 Rue du Jardin  
Naples, FL 34105  
[mooringspark.org/](http://mooringspark.org/)  
[moorings-park-at-grey-oaks](http://moorings-park-at-grey-oaks)

## **The Osborn**

101 Theall Road  
Rye, NY 10580  
[theosborn.org](http://theosborn.org)

## **Saint John's On The Lake**

1840 North Prospect Avenue  
Milwaukee, WI 53202  
[saintjohnsmilw.org](http://saintjohnsmilw.org)

## **Vicar's Landing at Sawgrass**

1000 Vicar's Landing Way  
Ponte Vedra Beach, FL 32082  
[vicarslanding.com/](http://vicarslanding.com/)  
[#home\\_intro](http://#home_intro)

## **Vicar's Landing at Oak Bridge**

1000 Vicar's Landing Way  
Ponte Vedra Beach, FL 32082  
[vicarslanding.com/oakbridge](http://vicarslanding.com/oakbridge)

## **Waverly Heights**

1400 Waverly Road  
Gladwyne, PA 19035  
[waverlyheightsltd.org](http://waverlyheightsltd.org)

**NOVARE**<sup>®</sup> To learn more about Novare, visit us online at [Novare.org](http://Novare.org) or email us at [info@Novare.org](mailto:info@Novare.org).