



ANNUAL REPORT

2021






60TH
ANNIVERSARY

LETTER FROM OUR CHAIR & PRESIDENT

While COVID-19 kept us from visiting many of our member communities and hosting in-person events in 2021, it did not stop us from a year of successful advocacy, education, innovation, and awareness building about housing, care and services for older adults.

From our role in the launch of the Master Plan for Aging in January to advocacy on visitation, vaccines, and staffing to the launch of our Workforce Blueprint for Action in May and the launch of our DEI Initiative in June to new grants from CMS/CDPH and foundations, our year was spent working on your behalf, as our members. Our partnership with LeadingAge adds strength to our work as we share resources and information daily on critical issues.

LeadingAge California staff sit on more than 20 key committees at the State level, allowing us an inside view of discussions and opportunities for influencing decisions that impact our members and those they serve. We are proud of our relationships with key legislators, agency heads, and department directors who have helped to mobilize our messages and collaborate on solutions.

Our Workforce Blueprint for Action served as a template to guide funding and policy discussions across California State Health and Human Services Agency, Department of Health Access and Information (formerly OSHPD), and Department of Aging (CDA), the Department of Labor and Development, and other key offices. These discussions helped to identify funding for critical training, development and recruitment of clinical staff.

Our Diversity, Equity and Inclusion Initiative (DEI) served as a launching point for our DEI Cabinet to consider the training and development needs of our members, beginning with the development of a DEI Roadmap and the DEI microsite on our website.

As we wrap up 2021, our focus and financial position are strong – guided by our 2019-2022 Strategic Plan's five key initiatives: Lead Public Policy • Advance 21st Century Leadership & Education • Grow the Workforce • Foster Innovation • Enhance Public Awareness.

We are proud of our Board of Directors, Committee Chairs and Members, and our member staff and residents for engagement in advocacy, education and public awareness building throughout the year. We are also proud of the work of the LeadingAge California staff for their strength and determination to push forward during the ongoing pandemic.

This Annual Report provides a summary of our 2021 work and highlights key value points of our initiatives.



A handwritten signature in black ink.

Molly Forrest
Chair

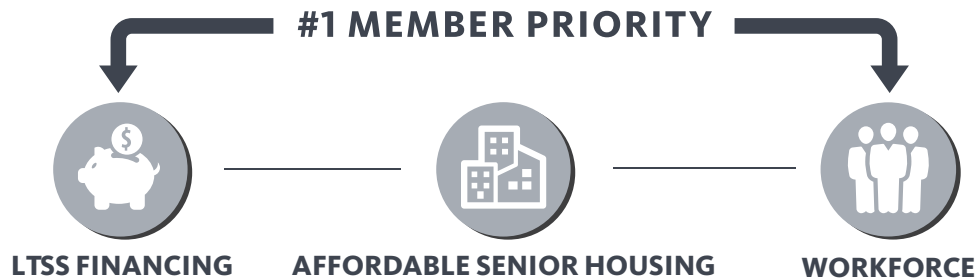


A handwritten signature in black ink.

Jeannee Parker Martin
President & CEO

STRATEGIC GOALS

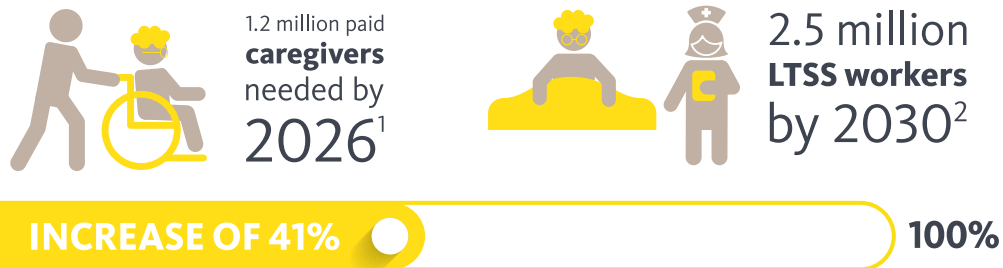
#1 LEAD PUBLIC POLICY



#2 ADVANCE 21ST CENTURY LEADERSHIP & EDUCATION



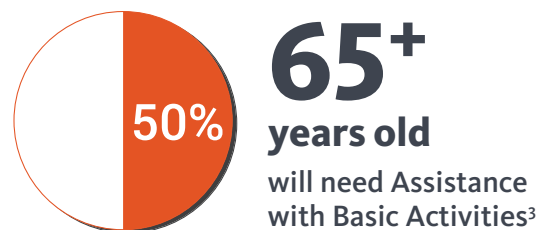
#3 GROW THE WORKFORCE



#4 FOSTER INNOVATION



#5 ELEVATE PUBLIC AWARENESS



¹ U.S. Bureau of Labor Statistics, 9/2018: <https://www.bls.gov/ooh/healthcare/home-health-aides-and-personal-care-aides.htm>

² LeadingAge Workforce Center, <https://leadingageca.app.box.com/file/296739810045>

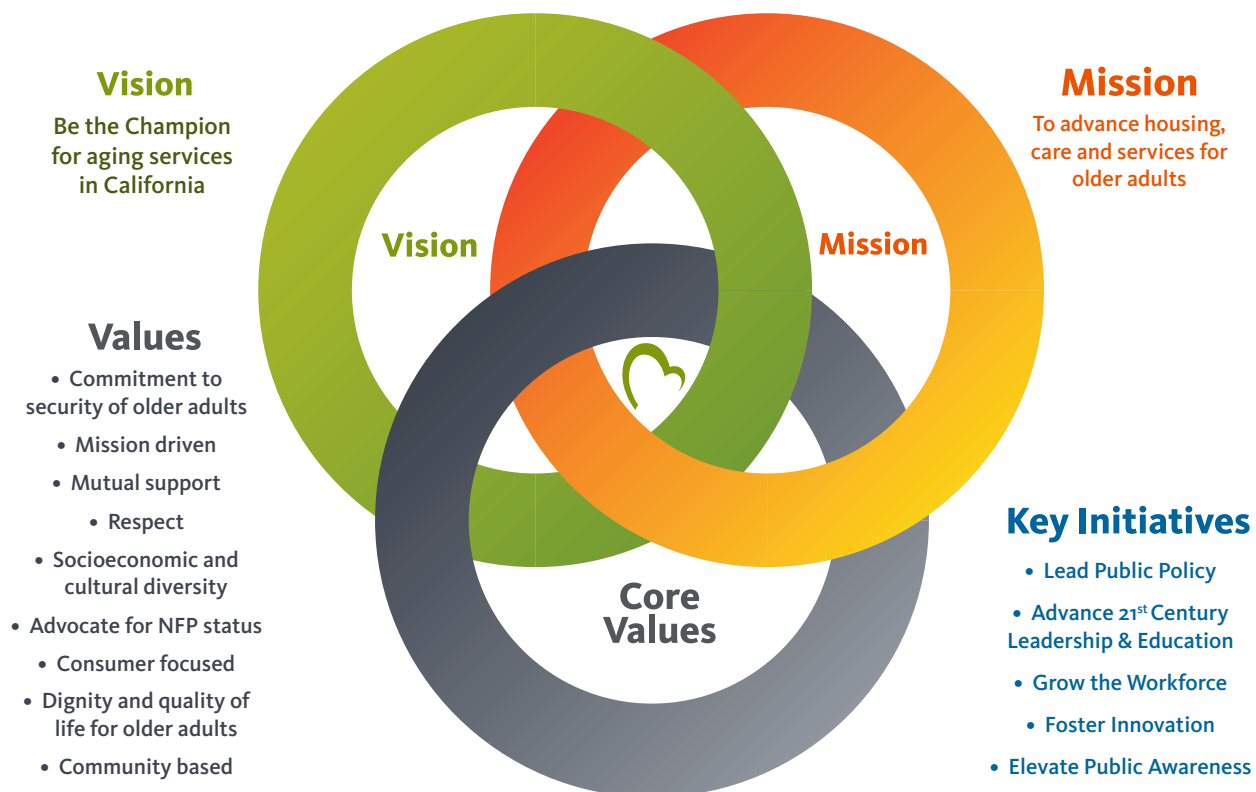
³ A New Vision for LTSS, http://www.leadingage.org/sites/default/files/A%20New%20Vision%20for%20Long-Term%20Services%20and%20Supports_FINAL.pdf

MISSION, VISION AND VALUES

LeadingAge California has been the state's leading advocate for quality, non-profit senior living and care since 1961. The association's advocacy, educational programs and public relations help its members best serve the needs of the state's older adults. LeadingAge California represents nearly 700 non-profit providers of housing, care and services for older adults, as well as business service providers.

Our mission, vision and values help develop resources, activities and offerings to strengthen our member organizations, and to help members navigate the complexities facing their communities.

Through our work behind the scenes testifying at public hearings, building coalitions, serving on committees and building partnerships — LeadingAge California actively worked to create system changes through advocacy that strengthened members' viability, educational resources and leadership development, created more opportunities for workforce development and supported innovations in the delivery of housing, care and services for older adults.





CONTINUED UNPRECEDENTED ADVOCACY EFFORTS

Another full year of the COVID-19 pandemic continued to challenge LeadingAge California members in a variety of ways. Surges of the Delta and Omicron variants prompted regulatory agencies to impose new vaccination and booster requirements. Throughout the year, LeadingAge California policy staff conveyed the latest requirements and provided guidance and technical support to members implementing the dizzying array of state and federal requirements.

The 10-year Master Plan for Aging was unveiled early in the year and set the state's roadmap for policy work impacting aging and people with disabilities. With more than 100 initiatives, LeadingAge California priorities were clearly reflected in the final document. The attention to affordable housing was chief among the issues that LeadingAge California staff developed for the plan, becoming the first goal "Housing for All Ages and Stages," of the final Master Plan for Aging released in January.

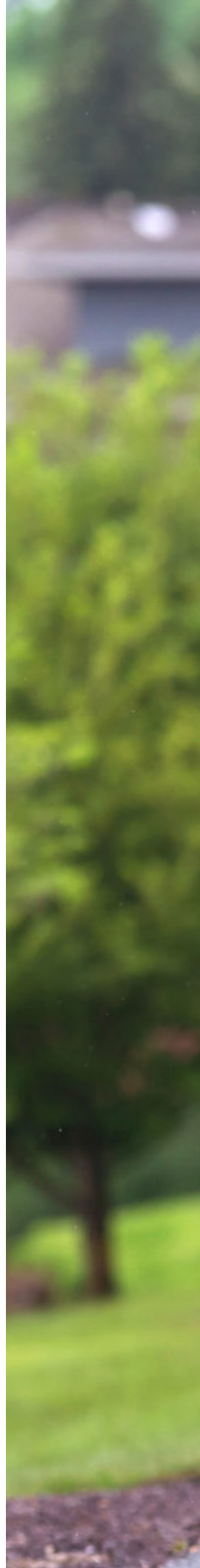
The focus of this year's legislation was obviously centered on COVID-19 and pandemic recovery as well as emergency preparedness/disaster response. There was a record 100 bills related to housing and 30 bills advancing the Master Plan for Aging proposals. Key bills included a reintroduction of a CCRC oversight bill, [AB 707 \(Cortese\)](#). Bills were also introduced to require internet access for RCFE residents ([AB 665](#)), "clean and safe" living conditions for RCFEs ([AB 895](#)), and the licensing referral agencies ([AB 499](#)) as well as allowing electronic monitoring in assisted living ([AB 1300](#)). Nursing home legislation was introduced to increase citations ([AB 323](#)), increase disclosure of ownership interests ([AB 1502](#)), addressing unrepresented patients ([SB 460](#)) and requiring medical director certification ([AB 749](#)). To review the LeadingAge California 2021 legislative work, download the [Legislative Wrap Up](#) which was sent to all members in October.

We continued with our virtual policy event, the RISE Policy Summit, with a three-day provider specific format followed by virtual legislative visits.



In 2021, LeadingAge California achieved the following:

- › Monitored 300 bills and co-sponsored AB 1083 (Nazarian) to create a Nursing Pilot Program in Affordable Housing.
- › Moved forward with our coalition working to create a Long Term Services and Supports financing system for California.
- › Amended AB 654 (Reyes) to include RCFEs in the list of exempted providers from reporting COVID-19 cases to CalOSHA.
- › Continued to work with Front Porch and the Lighthouse Project to advise HCD on their forthcoming portfolio-wide Broadband Needs Assessment.
- › Established the Policy “A-Team” which comprises key committee & cabinet members, repeat advocates, and other LeadingAge California members who express interest in becoming active advocates on the highest priority issues, receive insider updates on key legislation and influence the trajectory of our advocacy efforts.
- › Added two additional consultants to the lobbying team: Kathy Mossburg and Darby Kernan with Mosaic Solutions and Advocacy.
- › Held an Assisted Living Waiver (ALW) information sharing session where current members shared their experiences as an ALW provider to those members who are contemplating becoming a part of the program.
- › Hosted two virtual wine and trivia events through the LeadingAge California PAC for the benefit of candidates who share our commitment to aging services.
- › Further developed and built a coalition to support the Long-Term Care Mutual Aid Plan (LTC-MAP) Initiative for California and held several meetings and demonstrations with policymakers and stakeholders.
- › Launched and began securing funding for our California Integrated Care at Home (CICH) program which brings wellness workers to affordable housing buildings and the surrounding communities.
- › Continued to build a bridge via involvement with the Board of the California Collaborative for Long-Term Services and Supports (CCLTSS) between aging and disability advocates to promote public policy that protects vulnerable populations.







UNLOCK THE POTENTIAL OF 21ST CENTURY LEADERSHIP AND EDUCATION

In the midst of all the extraordinary challenges in 2021, LeadingAge California had something worth celebrating; its 60th Anniversary. Founded in 1961, LeadingAge California was formed to advance housing, care, and services for older adults. While much has changed since its inception, one thing that has remained constant is LeadingAge California's advocacy, education and public awareness as a champion for aging services in the state. To honor its Diamond jubilee, Jeannee Parker Martin, President and CEO led a virtual tour of 60 facilities within 60 days (pictured below is the visit with Casa de las Campanas). The tour was nothing short of amazing. It highlighted various communities, their residents, management teams, and celebrities who were advocates for older adults safely and eagerly aging in place.

As LeadingAge California continued to host meetings and events virtually, we had an unprecedented opportunity to reimagine our education delivery. Our new Learning Management System expanded its offering to nearly 100 courses within just a short period of time. Additionally, this new format allowed our EMERGE Leadership Development Program to be more flexible, allowing access from anywhere to sharpen our future leaders' digital skills.



LeadingAge California celebrates its 60th Anniversary with a 60/60 Tour

Visiting Casa de las Campanas in San Diego, CA via Zoom with Sonya Googins (Resident), Craig Brown (Board Chair), Chris Burk (Administrator) and Kim Dominy (Executive Director). Hosted by Jeannee Parker Martin, President & CEO of LeadingAge California and Jack York, Co-Founder of iN2L.

PROMOTING A DIVERSE, EQUITABLE AND INCLUSIVE WORKFORCE

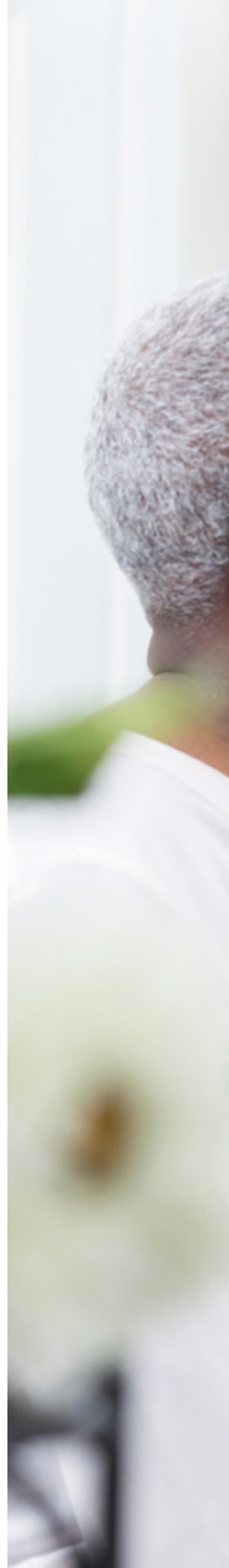
At LeadingAge California, we believe that equity and inclusion are the core principles for building a high-quality workforce and for providing housing, care, and services for older adults. In 2021, LeadingAge California launched its Diversity, Equity and Inclusion (DEI) Initiative with grant support from Archstone Foundation, the California Health Care Foundation, and TELACU. As such, we formed an Equity Cabinet to review and make recommendations to increase diversity and equity in our field. We also hired a full-time Director of Diversity, Equity and Inclusion to lead this charge.

As California continues to face workforce shortages, LeadingAge California's Workforce Situation Room (WFSR) launched the Workforce Blueprint for Action which can be used by our membership and others to grow the workforce through innovative recruitment, retention, training and career development opportunities.

The Workforce Blueprint for Action identified six initiatives that include strategy, public policy, education, technology, public awareness, and workforce development. Our singular goal – to grow the workforce by 16,000 jobs over 10 years has garnered support from foundations, and California agencies and departments. The California State Health and Human Services Agency, Department of Health Access and Information (formerly OSHPD), Department of Aging (CDA), the Department of Labor and Development, and other key offices expressed interest in our approach and engaged LeadingAge California staff in policy and budget-related discussions.



WORKFORCE BLUEPRINT FOR ACTION







FOSTERING INNOVATION

LeadingAge California continued to foster innovation by hosting the Innovation Showcase for a second year, highlighting dozens of innovative companies offering products and services to help enhance the quality of life in housing, care and services for older adults. This showcase encouraged ideas that included evidenced-informed programs and technologies for residents and staff engagement, life enrichment approaches, and enhanced safety and security through the use of artificial intelligence to help promote senior living of the future.

This year's Innovation Showcase highlighted an impressive variety of innovative solutions to help enhance the quality of life in housing, care and services for older adults.

Of the top six finalists, two innovators walked away with accolades. The “People’s Choice” award went to Obie for Seniors by EyeClick’s, a smart projector gaming technology. However, it was SafelyYou’s AI Technology in fall prevention that prevailed as the Innovation Showcase winner and was awarded \$10,000 in prize money.



INNOVATION SHOWCASE WINNER

SafelyYou provides advanced AI-enabled technology and consulting services that have been proven to dramatically reduce senior falls, and the direct and indirect costs, including liability and claims, while increasing length of stay.



PEOPLE'S CHOICE AWARD WINNER

Obie For Seniors is an interactive projection product specialty designed for senior citizens. Obie helps to enhance the conditions of senior housing facilities, hospitals, and clinics with specially designed interactive games that provide residents with engagement, fun and encourages increased mobility. Obie’s interactive projector can turn the floor, wall, or tabletop into a fully-interactive surface for multiple users.

ELEVATING PUBLIC AWARENESS

At LeadingAge California, we strive to elevate the public consciousness about the acute needs of California's growing aging population. The demands for workforce, long term services and supports, supporting financing needs and ending ageism got off to an amazing start in 2019 with the launch of our public awareness campaign, Age On. Rage On.™ This campaign continued in 2021 with a strong media presence and allowed support from those pledging to ensure California's older adults have access to long-term services.

LeadingAge California is seen by local, state and federal offices as a go-to resource and champion for aging services in the state. We regularly engage in committees, meetings and interviews related to housing, care and services for older adults. This year, we increased engagement with colleges, universities, foundations and other associations, including UC Berkeley CITRUS Health, Stanford Center on Longevity, California Health Care Foundation, Archstone Foundation and the Gary and Mary West Foundation. Invitations also increased to speak on radio, television and other virtual programming in 2021, as well as at member Boards of Directors meetings.

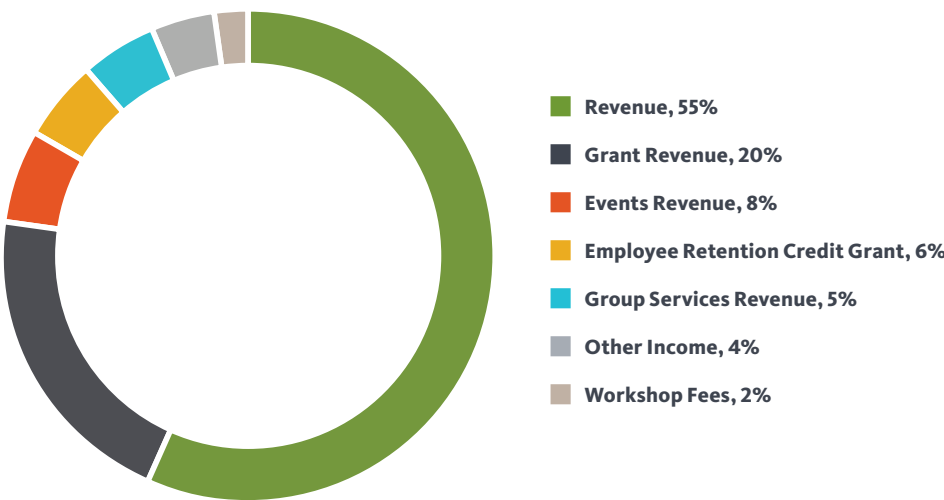




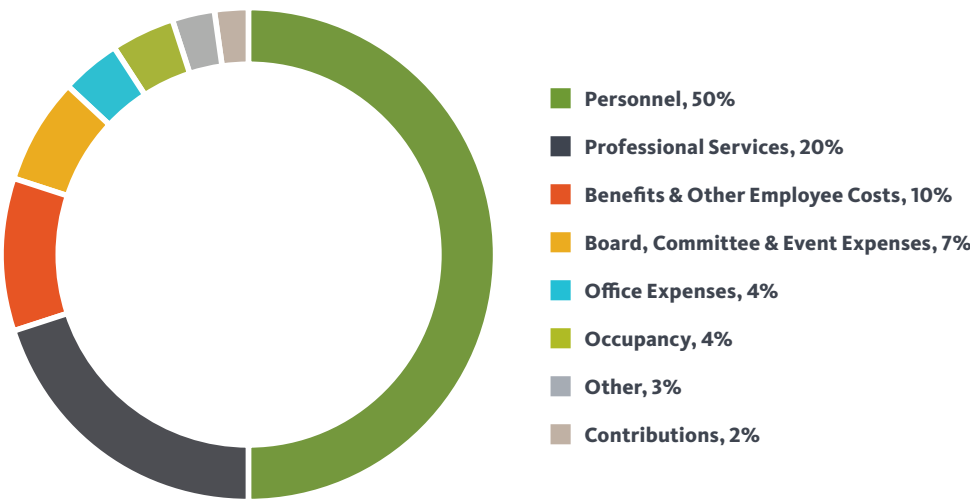
STATEMENT OF FINANCIAL POSITION

LeadingAge California concluded 2021 by exceeding net operating income while holding expenses below budget. We successfully grew Grant Revenue which is now 20% of overall revenue. Personnel and employee benefit cost remain the largest component of operating expenses at 60%.

REVENUES



EXPENSES



EXECUTIVE COMMITTEE



Molly Forrest
Board Chair



Jasmine Borrego
Past Board Chair



David Reimer
Chair-Elect



Deborah Herbert
Vice Chair & Treasurer



Sheri Peifer
Secretary

ADDITIONAL BOARD MEMBERS

Ronald Bolding

Pilgrim Place
Member

Darrick Lam

ACC Senior Services
Member

James Rothrock

Episcopal Communities & Services
Member

Tom Briody

Institute on Aging
Member

Claude Lowen

San Francisco Towers
Resident Member

David Stienstra

Inland Christian Home
Regional Representative

Kim Dominy

Casa de las Campanas
Member

Tara McGuinness

HumanGood
Policy Advocate

Lynda Tanner

VNA Health
Member

Stuart Hartman

Retirement Housing Foundation
Policy Advocate

Todd Murch

Eskaton
Member

Jeannee Parker Martin

LeadingAge California
President & CEO

Christopher Ichien

Covia Communities
Regional Representative

Tuan Nguyen

Relation Insurance Services
Member

COMMITTEE CHAIRS



Janet Holland
Baker Tilly
Audit Committee



Angelique D'Silva-Williams
TELACU
Awards Committee



Jasmine Borrego
TELACU
Board Development Committee



Deborah Herbert
Monte Vista Grove Homes
Finance Committee



Sheri Peifer
Eskaton
Planning Committee



Tiffany Karlin
Wipfli
Political Action Committee



Tara McGuinness
HumanGood
Public Policy Committee



Chris Gershtein
Masonic Homes of California
Service Excellence Committee

CABINET CHAIRS



Donna Griggs-Murphy
HumanGood
Affordable Senior Housing Cabinet
Equity Cabinet



Justin Weber
Front Porch
Assistant Living Cabinet



Sue Fairley
Hillcrest
Health Services Cabinet



Lynda Tanner
VNA Health
Home & Community Based
Services Cabinet





LeadingAge California Annual Report 2021
1315 I Street, Suite 100, Sacramento, CA 95814

leadingageca.org |     