LeadingAge® California

ANNUAL REPORT

2025



LETTER FROM OUR CHAIR & CEO

As we close 2025, we are proud to share that this final year of our 2023–2025 Strategic Plan has been one of resilience, momentum, and measurable impact. Despite federal grant freezes, shifting policy landscapes, and a significant state budget deficit, LeadingAge California remained focused on our mission: advancing housing, care, and services across the continuum for older adults. Because of your engagement and leadership, we not only navigated headwinds — we delivered results.

Enhancing the Workforce. We successfully concluded The Gateway-In Project, a historic $35 million workforce initiative that attracted more than 15,500 applicants and graduated 6,185 CNAs, HHAs, resident service coordinators, and activities professionals across 42 counties. Building on this success, we launched the Gateway-In Academy to sustain and expand workforce training into 2026 and beyond. We also introduced the Leadership Development Certificate Series — EMERGE, EXCEL, and ELEVATE — creating a full continuum of leadership development to strengthen succession planning and executive readiness across member organizations. These efforts keep us on track toward our long-term goal of growing California's workforce by 16,000 individuals by 2031.

Leading Public Policy. Your association remained "at every table," monitoring more than 200 bills and actively lobbying 50 pieces of legislation. We defended critical funding, neutralized burdensome regulatory proposals, secured $500 million in LIHTC funding, increased the senior housing tax credit set-aside from 15% to 20%, and brought AB 474 to the Governor's desk. We advanced emergency preparedness policy, strengthened workforce advocacy, and maintained a strong PAC position. Our voice continues to be recognized statewide — reinforced by more than 50 committee appointments and my appointment to the California Commission on Aging.

Supporting Growth and Adaptation. Membership remained strong at more than 800 members, including expansion into Hawai'i and exploratory growth in Idaho and Nevada. We deepened partnerships, broadened educational offerings, and continued to provide tools that help members navigate financial, operational, and governance challenges in a rapidly evolving environment.

Positioning for Innovation and Diversification. In collaboration with IDEO, eight member organizations, and several thought partners, we completed a design sprint that produced an AI-driven workforce support prototype. Artificial intelligence also shaped discussions at BOLD and within our own operations, improving efficiency and preparing members for technology integration. We successfully completed three major CMP grants (Java, Enlightenment, and GARDEN), secured approval for Java II, and applied for more than $7 million in new grant funding, including our first out-of-state CMP opportunity.

Organizationally, we remained financially strong, earned Great Place to Work certification, completed a clean audit with no findings, launched a new grants office, implemented new HR and financial systems, and began a thoughtful CEO succession process to ensure a smooth leadership transition in 2026.

2025 marks the successful completion of our 2023–2025 Strategic Plan. We are financially stable, strategically focused, and well-positioned for our 2026–2028 plan. Most importantly, we remain the trusted voice and champion for housing, care and services in California and beyond.

Thank you for your partnership, your courage, and your unwavering commitment to older adults. Together, we are transforming for the future and building what comes next.

With gratitude,



Stuart Hartman
Chair, Board of Directors



Jeannee Parker Martin
President & CEO

OUR STRATEGIC PLAN

STRATEGIC INITIATIVES 2023–2025

Using effective leadership, advocacy and education, LeadingAge California will:



ENHANCE THE WORKFORCE



LEAD PUBLIC POLICY THAT HELPS MEMBERS THRIVE



SUPPORT GROWTH & ADAPTATION



POSITION FOR INNOVATION & DIVERSIFICATION

THE OUTCOMES

The outcomes indicating our progress include:

Organizational Health & Sustainability Outcomes

- Membership and revenue diversification and growth
- DEI is an underpinning of the Association and its members
- Association is primary "go-to" for policy across the continuum of housing, care and services for older adults
- Organizational structure, expertise, and partnerships reflect and engage a broad and evolving membership

Member-Level Outcomes

- Members have access to tools, competencies, resources, and partnerships that support workforce, innovation, and sustainability
- Members believe their interests are represented by and are engaged in the Association
- Regulatory and legislative agenda advances priorities that reflect a diversity of member needs

Systems-Level Outcomes

- Workforce has increased across the continuum of housing, care and services to support older adults
- Increased public engagement of the value of older adult services and careers
- Improved funding and payment equity across sectors

Measures of Our Success

- 3,000 additional workers trained through LeadingAge California programs
- Increased State investment in workforce from policy initiatives
- Minimum of $10M in new grants sought annually
- Member retention exceeds 90%

OUR MISSION, VISION, VALUES AND BRAND PROMISE

Since 1961, LeadingAge California has been the state's leading advocate for quality, mission-driven, community-based senior living and care. 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 more than 800 members, including providers of housing, care and services for older adults and business service providers.

> *LeadingAge California is seen by many working in local, state, and federal offices and by the media as the go-to resource on the continuum of housing, care, and services for older adults.*

LeadingAge California worked behind the scenes to advance system change through advocacy. This included testifying at public hearings, building coalitions, serving on committees and developing partnerships. These efforts strengthened member viability, expanded educational and leadership resources, created workforce opportunities and supported innovation in housing, care and services for older adults.

MISSION

To advance housing, care and services across the continuum for older adults

VISION

Be the champion for aging services in California

VALUES

Dignity and quality of life
Equity and inclusion
Innovation
Mission-driven, community-based
Mutual support
Respect

BRAND PROMISE

Inspire. Serve. Advocate. Together.



LEAD PUBLIC POLICY THAT HELPS MEMBERS THRIVE

In 2025, LeadingAge California strengthened its reputation as a trusted and influential voice for mission-driven providers of housing, care, and services for older adults. The association was consistently recognized by policymakers, state agencies, and thought leaders as an essential contributor to shaping policy decisions affecting older adults.

Over the past year, the Public Policy team navigated a rapidly shifting geopolitical and fiscal landscape that has directly affected providers across the state. Federal policy changes, particularly reductions stemming from H.R. 1, have created funding constraints across health care, long-term services and supports, and safety-net programs, with the 2025–26 California budget explicitly noting the pending impact of federal cuts on multiple systems serving older adults.

At the state level, California faced a significant budget deficit, estimated at $12 to $15 billion depending on revenue projections, requiring difficult decisions and ongoing fiscal adjustments. This period also coincided with turnover among key administration-level officials, contributing to shifts in agency priorities and slower policy execution. In this environment, LeadingAge California remained a stabilizing and credible presence, ensuring that member needs continued to be represented despite unprecedented uncertainty in both state and federal policymaking.

Overview

Throughout 2025, the LeadingAge California Public Policy team represented members at key legislative and administrative tables. Staff served on major commissions, committees, university panels, and statewide coalitions, ensuring that the perspectives of aging services providers were incorporated into decision-making at every level. These efforts positioned LeadingAge California at the forefront of policy discussions on workforce and employment issues, housing and homelessness, and access to long-term services and supports. The association also played a critical role in defending against excessive regulatory expansion and successfully preserved billions of dollars in State general fund appropriations for programs serving older adults.

LeadingAge California contributed to a wide range of state committees and advisory bodies, including the Disability Aging and Community Living Advisory Committee, the CalOES Access and Functional Needs Committee, the California Collaborative for Long-Term Services and Supports, and committees focused on care delivery, homelessness, digital equity, and long-term services and supports.

Staff monitored more than two hundred bills during the legislative session and engaged in active lobbying on fifty of them. Seventy-one bills ultimately became law, ten were vetoed, and the remainder did not advance.

The association also sponsored legislation to create a comprehensive state-led workgroup tasked with improving emergency evacuation protocols for older adults in long-term care settings. Although the bill received unanimous support and advanced to the Senate Appropriations Committee, it was held due to projected costs.

Throughout the year, LeadingAge California provided extensive support and expertise to its members, including technical assistance on regulatory changes and facilitation of four workgroups and five policy cabinet meetings that informed the association's policy priorities. Staff regularly submitted comments on draft AFLs, PINs, and All Plan Letters and offered ongoing feedback to state and federal agencies such as CDPH, CDSS, DHCS, HCAI, and CMS. The association also advocated directly with agency secretaries and department directors on essential provider issues, including nursing home level of care funding and access, and the need to restore the scope of practice for licensed vocational nurses in delivering basic respiratory care.

Labor and Employment

- **Private Attorneys General Act (PAGA):** In 2025, LeadingAge California convened a coalition of its largest employers to address abusive PAGA and Workers' Compensation practices. In addition, the Public Policy team advocated against SB 310 – Wiener, which would have expanded PAGA and increased costly workplace litigation.
- **Immigration Reform:** LeadingAge California is working with LeadingAge and the American Business Immigration Coalition (ABIC) to champion common-sense immigration reforms to grow our workforce pipeline in key sectors of the U.S. economy, including health care.

Heightened Focus on Assisted Living

We continued to see a trend in legislation to increase regulations on Assisted Living in 2025. This year, we stood strong against proposals that would have increased costs or placed unnecessary burdens on providers and residents. Thanks to persistent advocacy, we successfully prevented several harmful measures from moving forward, including bills that would have:

- Mandated daily public reporting of misleading staffing ratios in residential care facilities for the elderly (RCFEs) (AB 508 – Aguiar-Curry)
- Expanded civil liability lawsuits and doubled recoverable damages (SB 29 – Laird)
- Imposed restrictive rent requirements on Medi-Cal enrollees in RCFEs (SB 433 – Wahab)
- Extended RCFE eviction notice process to 90 days (SB 434 – Wahab)
- Required RCFEs to maintain 72-hour on-site backup power (SB 435 – Wahab)

Skilled Nursing Level of Care Access

We were pleased that the 2025–26 state budget indefinitely delayed the implementation of AB 2511 (Chaptered, 2022), which requires SNFs to have an alternative power source for a minimum of 96 hours.

We were disheartened that the Workforce & Quality Incentive Program (WQIP) portion of Nursing Home Financing Reform, AB 186 (Chaptered, 2023) is no longer funded in the state budget. Without WQIP payments, we have argued that conceptualization of Nursing Home Financing Reform is broken, and sanctions without directed payments being offered in tandem will further reduce the ability of SNFs to provide quality and workforce improvements. DHCS is re-evaluating Medi-Cal nursing level of care funding and access in 2026 with its SNF Value Strategy Workgroup, of which LeadingAge California is a member.

LeadingAge California continues to advocate for increased capacity for Medi-Cal funded assisted living services, both in the Assisted Living Waiver and via CalAIM Community Supports. We continue to meet with DHCS staff to problem-solve to improve ALW provider and participant processing times, and to increase the Department's transparency and communication with assisted living providers.

As the Legislature continues to increase regulation of and administrative burden on SNFs, LeadingAge California will persist in advocating for the California Health & Human Services Agency to take an active role in examining the impact of these policies on access to skilled nursing care across the state.

Advancements in Housing Policy

- **Protecting Housing and Homelessness Funding in the State Budget:** Despite a large state budget deficit, the advocacy efforts of LeadingAge California helped protect much of the housing and homelessness funding in the 2025–26 state budget. This included a reallocation of $500 million for the Low-Income Housing Tax Credit (LIHTC) Program and preservation of over a billion dollars in funding for other critical housing programs such as the Multifamily Housing Program, Home Safe and the Housing and Homelessness Assistance Program.
- **California Debt Limit Allocation Committee (CDLAC):** The Public Policy team secured changes to the CDLAC regulations that raised the max eligible score for RAD for PRAC projects relative to other acquisition/rehabilitation projects. This change will create more availability of tax credits and tax-exempt bonds for our members and allow them to preserve more of their deeply affordable senior housing units.
- **Home Sharing:** LeadingAge California's sponsored bill, AB 474 (Ward), sought to expand non-profit home sharing services to more low-income older adults across California. The bill advanced to the Governor's desk but was unfortunately vetoed due to cost concerns.
- **Rental Assistance for Older Adults:** LeadingAge California continues to work with the Adult and Disability Homelessness Advisory Coalition to advocate for a rental assistance pilot program for older adults and people with disabilities at risk of or experiencing homelessness.
- **HUD West Management Fees:** LeadingAge California continues its work with the HUD Multifamily West Asset Management team to address challenges that affordable senior housing provider members face with their regulators at HUD. In late 2024, LeadingAge California submitted recommendations to the HUD West Region leadership team for modernization of the

Management Fee schedule. Throughout the year, LeadingAge California continued to engage HUD West on the issue and a new Management Fee memo is expected in 2026.

Medi-Cal for Older Californians

Medi-Cal's transformation of integrating medical care with social services, also known as California Advancing and Innovating Medi-Cal (CalAIM), continues to evolve. LeadingAge California has been actively engaging on multiple fronts.

The CalAIM program that could benefit older adults with a nursing home level of care has been significantly underutilized. LeadingAge California continues to advocate with the Department of Health Care Services (DHCS) to expand the Assisted Living Waiver and better leverage the CalAIM Assisted Living Community Support statewide.

This year, LeadingAge California joined the CBO Coalition. The Coalition advocates to create a level playing field for non-profit Community-Based Organizations (CBOs) in the delivery of CalAIM services by calling for adequate, cost-based rates and reducing administrative burden with Managed Care Organizations, so that CalAIM's stated goal of leveraging trusted, culturally rooted community providers is realized.

The continued implementation of H.R. 1 is expected to have far-reaching effects on California's aging services landscape, influencing Medi-Cal eligibility, PACE expansion, HCBS access, and the sustainability of CalAIM Community Supports. LeadingAge California continues to track these impacts and advocate for solutions to minimize the negative impacts of H.R. 1 on long-term services and supports.

Dementia and Behavioral Health Care

The California Department of Social Services (CDSS) Dementia Care Regulatory Package has modernized the way Assisted Living Communities can now emphasize person-centered care and aging in place. LeadingAge California members no longer need to transition residents solely because of a dementia diagnosis and are partnering with residents and families to focus on care quality and individualized planning.

In 2025, Proposition 1 began reshaping California's behavioral health system by redirecting county funding toward housing, treatment, and substance-use services for people with the most complex needs, including many older adults, while also launching a multibillion-dollar build-out of crisis, residential, and community treatment capacity statewide. At the same time, BH-CONNECT went live for Medi-Cal members, expanding community-based behavioral health services, workforce funding, and new benefits like transitional rent and institutional step-down supports, directly affecting older adults cycling between hospitals, nursing facilities, and homelessness. Together, these reforms are intended to shift care away from institutions and toward housing-linked, community-based behavioral health, though implementation will vary by county.

Social Impact Initiatives

LeadingAge California focuses on social impact initiatives centered around equity and access. Through these efforts, we aim to bridge gaps and improve community well-being. In 2025, we worked to advance education and funding for these efforts:

Emergency Response and Preparedness: Supported by $150,000 in grants from The SCAN Foundation and the UniHealth Foundation, LeadingAge California pursued two projects to expand emergency preparedness and response capabilities for long-term services and supports providers:

- **Los Angeles County Long-Term Care Mutual Aid Program:** The association continued its strategy to build a statewide long-term care emergency response and mutual aid system. In Los Angeles County, LeadingAge California worked in close collaboration with the Emergency Medical Services Agency, participating in an emergency response program for skilled nursing facilities, life plan communities, and assisted living providers based on long-standing mutual aid cooperatives in other states. This approach ensures that older adults are evacuated to the correct setting, avoiding the trauma and disruption of multiple relocations and is designed to become a model throughout California.
- **Emergency Response Gap Analysis:** Additionally, LeadingAge California initiated a statewide emergency response gap analysis and report to further support readiness across the sector. The Gap Analysis will be released in early 2026.

Community Health Access: LeadingAge California made significant strides in 2025 in advancing the development of California Integrated Care at Home (CICH), our evidence-based health and social care model. In partnership with Health Management Associates, LeadingAge

California published a study, "Finding a Path to Support Aging in Place in California: Gaps in Financing Enhanced Services to Address Affordable Housing Resident Needs and Priorities." Funded with grant support from The SCAN Foundation and the California Health Care Foundation, the study answers fundamental questions about older adults living in supportive housing and the components of a housing-based model of care that could prevent avoidable health and human costs that arise when access to resources is so difficult.

RISE Policy Summit 2025

LeadingAge California members from across the state convened in Sacramento in February to discuss the future of housing, care, and services for older adults at our annual RISE Policy Summit. Attendees participated in sessions that delved into the dynamic landscape of evolving public policy and regulatory issues and had the opportunity to connect with high-level policymakers from the Administration and Legislature.

Political Action Committee (PAC)

LeadingAge California's Political Action Committee remained strong. It closed the year with a balance of $200,000 after raising approximately $40,000 and contributing $11,400 to legislators during 2025.



Michelle Baass, Director, California Department of Health Care Services, speaking at the RISE Policy Summit

ENHANCE THE WORKFORCE

Enhancing the workforce and strengthening leadership remained central to LeadingAge California's mission in 2025. LeadingAge California brought together thousands of professionals through conferences, leadership programs, policy events, and virtual education. More than 3,100 participants engaged in learning opportunities that helped them navigate industry challenges, strengthen their organizations, and better serve older adults.

The year's educational programming addressed the most pressing issues facing providers while creating opportunities for members to learn from one another and share solutions. The **RISE Policy Summit** welcomed over 150 advocates to Sacramento for discussions with policymakers and state leaders on housing, care, and services for older adults. At the **BOLD Annual Conference & Expo**, over 600 attendees and exhibitors gathered to exchange ideas, explore emerging trends, and gain practical insights they could bring back to their organizations.

Leadership development remained a key focus. The **EMERGE Leadership Development Program** celebrated its 15th cohort and continued to prepare the next generation of leaders through mentorship, peer learning, and hands-on leadership development. Since its launch, the program has graduated more than 300 professionals working across California's older adult services sector.

Executive Connect offered a dedicated space for CEOs and senior leaders to step away from day-to-day responsibilities and focus on the bigger picture. Held in Napa Valley, the event featured discussions on communication, compliance, workforce issues, and leadership, while creating opportunities for meaningful connections and shared problem-solving.

Webinars continued to be a valuable resource for members, drawing nearly 2,000 participants throughout the year. These sessions delivered timely information on regulatory changes, operational challenges, and emerging issues affecting providers across the state.

Workforce development efforts were advanced through **The Gateway-In Project**, which concluded its statewide grant-funded training initiative in 2025. The program helped address workforce shortages by providing free training, career support, and job placement assistance for Certified Nursing Assistants, Home Health Aides, Activities Professionals, and Service Coordinators. To date, the initiative has trained 6,185 graduates and introduced thousands of Californians to careers serving older adults.

Through these efforts, LeadingAge California continued to enhance the workforce and support the people who provide housing, care and services in communities across the state.



Opening General Session at the LeadingAge California BOLD Annual Conference & Expo 2025

SUPPORT GROWTH & ADAPTATION

Strategic Growth for a Brighter Future

LeadingAge California strengthened its value proposition and financial sustainability through strategic growth and partnership expansion in 2025.

We secured new endorsed relationships designed to deliver exclusive value to provider members, saving them time in identifying trusted partners while generating non-dues revenue to help offset annual membership costs. New endorsed partners included Relias, a provider of learning and compliance solutions, and Instrumentl, a grant solutions platform. These relationships enhance operational support for members while reinforcing the association's long-term financial health.

Membership growth remained strong throughout the year. In 2025, we welcomed 103 new member organizations, including 69 providers, 28 business partners, and 6 allied members. Year-end totals reached 582 provider members, 118 business partners, 91 students, and 34 allied members, reflecting continued confidence in the association's advocacy, education, and member services.

Geographic reach expanded through the LeadingAge Pacific West initiative, extending our support beyond California to both Hawai'i and Nevada. By year-end, we supported nine provider members, one business partner, and one allied member in Hawai'i, as well as one Life Plan Community provider member in Nevada, demonstrating steady progress in regional growth and cross-state collaboration.

Local engagement remained a cornerstone of member value. Twenty-three communities and properties hosted complimentary regional networking events offering continuing education units. These programs addressed timely and operationally critical topics including disaster preparedness, employer compliance requirements, employee recognition strategies, and the value of partnership with PACE programs. More than 505 professionals participated across disciplines, including maintenance, facilities, human resources, marketing and sales, housekeeping, nursing, and executive leadership, underscoring the association's commitment to serving and supporting the full continuum of leadership and frontline teams.

Together, these achievements reflect a year of measurable growth, expanded impact, and continued investment in strengthening the organizations that serve older adults.



LeadingAge California staff visiting member Lesley Senior Communities

Civil Monetary Penalty (CMP) Grants for Skilled Nursing Facilities

The LeadingAge California Java Project provided 100 skilled nursing facilities with Java Group Programs, which are the first standardized peer support interventions designed to address the critical rates of depression and loneliness for older adults. Throughout the project, over 7,000 residents benefited from a Java session and formed new and strengthened connections. This project concluded in April 2025.

The LeadingAge California Enlightenment Project provided 50 skilled nursing facilities with Obie for Seniors' interactive gaming console to improve the quality of life of residents by addressing social isolation, loneliness, reduced mobility, and cognitive decline. Throughout the project, approximately 48% of residents were observed liking and using the Obie games. The project concluded in December 2025.

The LeadingAge California GARDEN Project (Garden Access Responds to Diagnosis and Environmental Needs) provided 75 skilled nursing facilities with gardens and classes to reduce resident loneliness, stimulate cognitive activity, and improve motor skills. The horticulture classes and engagement proved successful, with over 93% of residents reaching their goals and remaining positive or showing improvements. The project concluded in December 2025.

In 2025, the LeadingAge California Foundation continued to expand its CMP portfolio through two new initiatives. The organization secured its first out-of-state CMP award in Idaho through the Sandscape Project, set to begin in March 2026, utilizing kinetic sand play for resident engagement and quality of life improvement. The organization was approved for a second Java Project, expanding access to standardized peer support group programming, also beginning in March 2026.

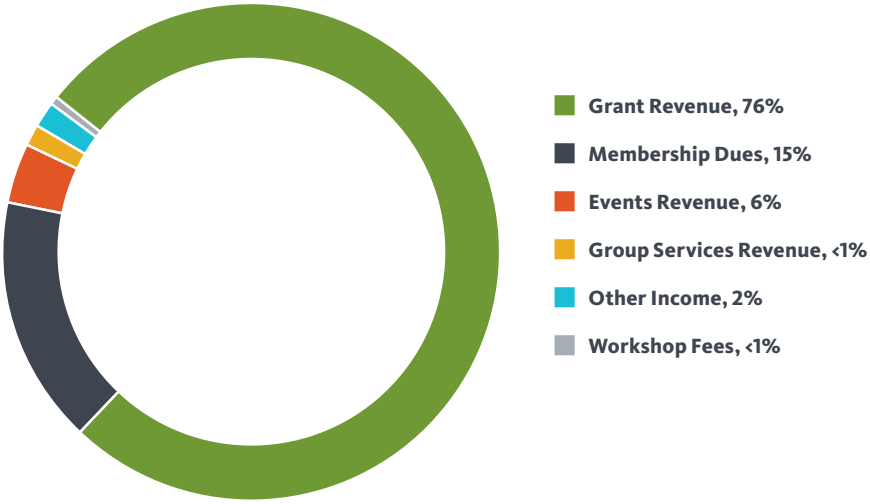


LeadingAge California member Casa Dorinda showcasing the Obie projector

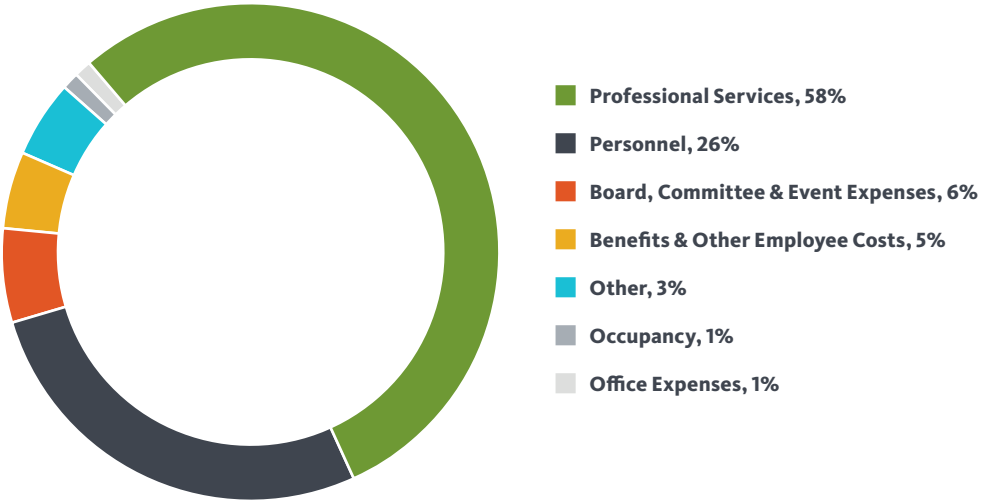
STATEMENT OF FINANCIAL POSITION

The fiscal year 2025 at LeadingAge California was characterized by significant positive changes. Grant revenues continued to grow, reaching 76% of total revenues. Professional services costs remained the largest component of operating expenses at 58%.

REVENUES



EXPENSES



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LeadingAge California Board of Directors, May 2025

LeadingAge California

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