



ANNUAL REPORT

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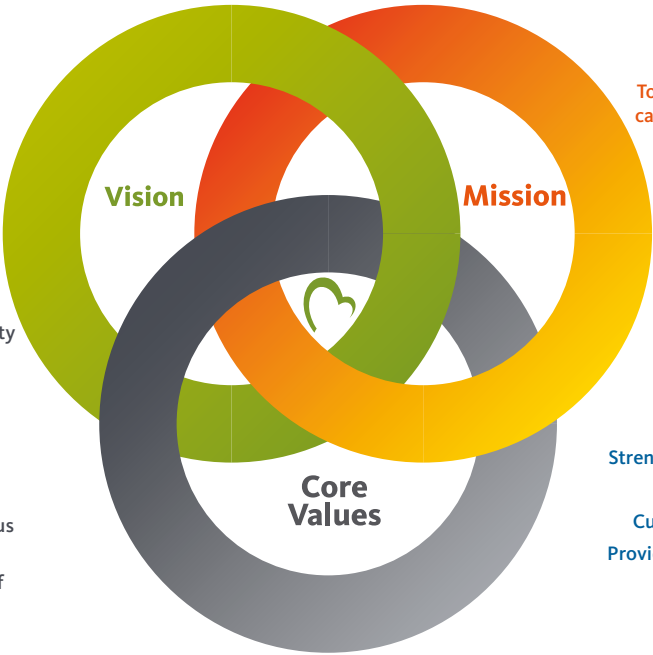
ABOUT LEADINGAGE CALIFORNIA

Founded in 1961, LeadingAge California is the state's leading advocate for quality, non-profit senior living and care. The association's advocacy, educational programs and public relations help its members best serve the needs of more than 100,000 of the state's older adults. LeadingAge California represents nearly 600 members focused on senior living and care - including affordable housing, continuing care retirement communities, assisted living, skilled nursing, home and community based care, and business partners and residents.

Vision
Be the Champion
for aging services
in California

Mission
To advance housing,
care and services for
older adults

- Values**
- Commitment to security of older adults
 - Mission driven
 - Mutual support
 - Respect
 - Socioeconomic and cultural diversity
 - Advocate for NFP status
 - Consumer focused
 - Dignity and quality of life for older adults
 - Community based



Goals
Strengthen Member Value
Lead Policy
Cultivate Leadership
Provide Leading Education

FROM THE CEO

A MESSAGE FROM THE PRESIDENT & CEO

We are pleased to present the 2017 LeadingAge California Annual Report. This year's report highlights the association's busy and successful year. We are particularly pleased with our legislative accomplishments, most notably the passage of the housing package – the first major housing funding legislation in over a decade. We also continued to elevate the visibility of the struggle that so many in the middle class have in affording services to remain independent. We also continued to work closely with our coalition partners to develop state level financing solutions for long-term services and supports as early as next year.

At the federal level, our advocacy was crucial to push against attempts in Washington, DC to dismantle Medicaid, the system that supports many older adults in our state – the state with the highest Medicaid population in the US. By sending more than 9,000 letters to Congress and participating in rallies in Washington, DC, our members joined forces and were instrumental in the successful funding of the HUD 202 program in the Congressional budget plan.

Our political influence increases annually with the steady growth and participation in our political action committee. We formulated a

new strategy to bring visibility to and heighten awareness among candidates of the issues facing our members. These policy efforts are targeted to protect quality services and advance the non-profit provider's ability to carry out its mission.

In 2017, we redoubled our member engagement efforts to increase the value of your membership in LeadingAge California. Notably, we enhanced and refined our internal systems, including a new state-of-the-art database, which will allow us to better serve you, and launched a new member-exclusive leadership webinar series.

Please join me in reflecting on this year's accomplishments. We value the partnerships we continue to build with allied organizations and the support we receive from our dedicated members. We will build on this year's success and reach new heights in 2018 and beyond!



Jeannie Parker Martin

President & CEO



2016-2017 LEADERSHIP

Executive Committee



Scot Sinclair
Chair
Executive Director
O'Connor Woods



Todd Murch
Immediate Past Chair
President/CEO
Eskaton



Jasmine Borrego
Chair Elect
President
TELACU Residential Management



Christina Cerrato
Vice Chair
Director of Operations
Episcopal Communities and Services



Mary Stompe
Secretary
Executive Director
PEP Housing



Molly Forrest
Vice Chair
CEO-President
Los Angeles Jewish Home for the Aging



Debora Herbert
Treasurer
Executive Director
Monte Vista Grove Homes



Jeannee Parker Martin
Member
President & CEO
LeadingAge California

BOARD OF DIRECTORS

OFFICERS

Scot Sinclair	Board Chair	O'Connor Woods
Jasmine Borrego	Chair Elect	TELACU Residential Management
Christina Cerrato	Vice Chair	Episcopal Communities and Services
Molly Forrest	Vice Chair	Los Angeles Jewish Home for the Aging
Deborah Herbert	Treasurer	Monte Vista Grove Homes
Mary Stompe	Secretary	PEP Housing
Todd S. Murch	Immediate Board Chair	Eskaton
Jeanne Parker Martin	President & CEO (Ex Officio)	LeadingAge California

DIRECTORS-AT-LARGE

Jack Cumming	Resident Member	Carlsbad by the Sea
Jeff Glaze	Group Services Board Chair	HumanGood
Robert T. Howell	Regional Representative	The Samarkand of Santa Barbara
Christopher Ichien	Regional Representative	Los Gatos Meadows
Tiffany Karlin	Regional Representative	Mueller Prost LC
Claude Lowen	Resident Member	San Francisco Towers
Penny Mallette	Regional Representative	O'Connor Woods
Lauren Moulton-Beaudry	Regional Representative	Front Porch
Michael A. Manley	Trustee Member	Institute for Senior Living
Sheri Peifer	Member	Eskaton
David Reimer	Regional Representative	Palm Village Retirement Community
Kendra Roberts	Regional Representative	HumanGood
Ronald D. Schaefer	Member	Episcopal Senior Communities
Justin Weber	Member	Casa de Manana
Angelique Williams	Member	TELACU Residential Management
Joyce Yarborough	Regional Representative	Pilgrim Place

LEADINGAGE POLICY ADVOCATES

Stuart Hartman	Retirement Housing Foundation
Priscilla J. Haynes	Santa Clara Methodist Retirement Foundation, Inc.
Keith Kasin	Plymouth Village Retirement Community
Tara S. McGuinness	HumanGood

LEADINGAGE BOARD MEMBER, ELECTED BY LEADINGAGE

Roberta Jacobsen	Front Porch
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YEAR IN REVIEW

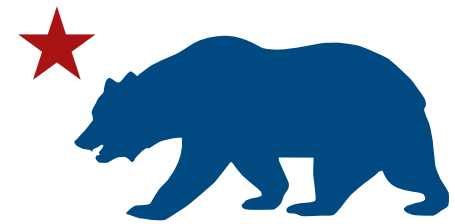
A YEAR IN REVIEW

By the Numbers



135
Legislation
Tracked

1,153
Grassroots
Connections

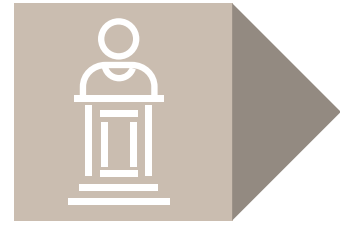


LeadingAge California

Political Action Committee



\$67K
Contributions
to the PAC



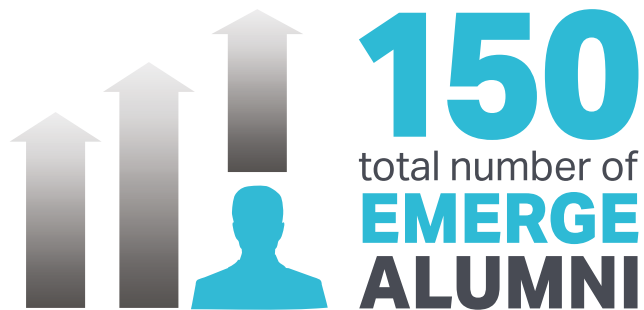
15
Candidates
Supported



285 TOTAL
Member Advocates
Lobbying at Events



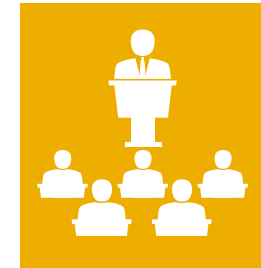
\$16 million
 in Value First Volume



Education and Conferences



3,094
ATTENDEES
 of EDUCATION
 PROGRAMS



7
EVENTS
 including
THREE MAJOR
CONFERENCES

LeadingAge California Total Members



Numbers calculated as of December 1, 2017

2017 AWARD RECIPIENTS

LeadingAge California congratulates 2017 awardees and their dedication to the field of aging services

Mentor of the Year



Bruce Udelf
Baywood Court

Associate Member of the Year



Geoffrey Morris
Affirma Rehabilitation

Best Practices/Innovation Award



Cheryl Wilson
St. Paul's Senior Homes and Services

Senator of the Year



Senator Mike McGuire
(D-Santa Rosa)

Assemblymember of the Year



Assemblyman Adam Gray
(D-Merced)

Grassroots Advocates of the Year

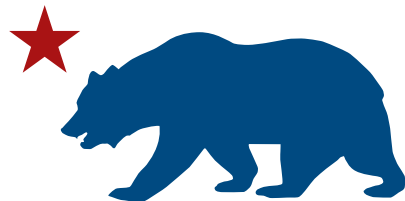


Stuart Hartman
Retirement Housing Foundation

MAJOR ACCOMPLISHMENTS

LEADING POLICY

- Led the effort to keep Long Term Services and Supports (LTSS) financing on the policy agenda with strong collaboration with key organizations
- Engaged with LeadingAge members and the legislature to pass the Affordable Housing Legislation Package bringing millions of new dollars for development and preservation
- Generated more than 9,000 messages to Congress for the “Save HUD 202” Campaign, which successfully funded the program in both House and Senate budgets
- Protected members from onerous provisions including a private right of action for regulatory violations, pushing back against efforts to lower evidentiary standards in order to award higher attorney’s fees and working to protect non-profit providers’ ability to contract with counties
- Developed new 2018 Public Policy Principles in consultation with the Public Policy Committee and Policy Cabinets
- Worked to stop efforts to dismantle Medicaid in federal healthcare reform bills
- Opposed H.R. 1 and activated members to protect nonprofits from the harmful provisions in the federal tax reform bills
- Developed a new PAC Strategy to engage more members and strengthen LeadingAge California’s voice



LeadingAge California
Political Action Committee

STRENGTHENING MEMBER VALUE

- Identified and implemented a new Membership Management System, ClearVantage, to better serve member needs
- Developed a comprehensive recruitment, engagement and retention campaign
- Re-defined value propositions for each of the member categories to increase engagement and services
- Developed guidance and technical reference tools for the new Nursing Home Requirements of Participation, End of Life Option Act, Emergency Preparedness and CCRC Resident Board Members



ACCOMPLISHMENTS

MAJOR ACCOMPLISHMENTS

CULTIVATE LEADERSHIP

- Met goal to increase EMERGE enrollment by 10%
- The EMERGE program has graduated 150 new leaders and plans to expand in 2018
- Created the 2nd Tuesday Executive Leadership Webinar Series with over 120 member CEOs and executives participating

PROVIDE LEADING EDUCATION

- Provided learning opportunities for over 3,000 participants throughout the year
- Partnered with a variety of experts to offer online training on the latest RoP requirements, dementia and LGBT and nursing issues
- Successful Annual Conference in Monterey offered prime education opportunities, leading expert keynote presenters and new products
- Participation increased by 10% at the 2017 Policy & Leadership Summit
- Partnered with Stanford to promote physical activity “Steps for Change” study with several member senior housing communities in the Bay area





LeadingAge California

Political Action Committee

LeadingAge California PAC Contributors*

As of November 13, 2017

PLATINUM LEVEL

- Erickson Living

GOLD LEVEL

- Jasmine Borrego, TELACU Residential Management
- Jerry Brown, Bethany Center Senior Housing, Inc.
- Bruce Cameron, Altavita
- Hanson Bridgett, LLP
- Alan Manning, PointClickCare
- David Reimer, Palm Village Retirement Community
- Alice Sexton, Retirement Housing Foundation
- Scot Sinclair, O'Connor Woods

SILVER LEVEL

- Victoria Brosnan, Therapy Specialists
- Jeff Glaze, Cornerstone Affiliates
- Tiffany Karlin, Mueller Prost LC
- Melvin Matsumoto, Channing House
- Jeannee Parker Martin, LeadingAge California

SUPPORTER LEVEL

- Babak Amali, Burger Rehabilitation Systems
- Tom Briody, Institute on Aging
- Shawn Leary, Morrison Senior Living
- Todd Murch, Eskaton
- Tuan Nguyen, Ascension Benefits & Insurance Solutions
- Laurie Small, The Sequoias - Portola Valley
- Debra Varner, Bethany Center Senior Housing
- Cheryl Wilson, St. Paul's Senior Homes and Services

SPECIAL THANK YOU TO OUR ENDORSERS FOR YOUR CONTRIBUTION

- Bob Fay, O'Connor Woods
- Janice Guilliano, LeadingAge California
- Cindy Ward, LeadingAge California
- Ronald Schaefer, Episcopal Senior Communities
- Keith Kasin, Plymouth Village
- Joyce E Yarborough, Pilgrim Place
- Christopher Eichen, Episcopal Senior Communities
- Lauren Moulton-Beaudry, Front Porch
- Jeff Glaze, HumanGood
- Eric Dowdy, LeadingAge California
- Deborah Herbert, Monte Vista Grove Homes
- Claude Lowen, Resident
- Kevin Gerber, Episcopal Senior Communities
- Vito Genna, Sierra View Homes
- Laverne Joseph, Retirement Housing Foundation
- William C Scharbach, Palm Village Retirement Community
- Kim P. Houser, Monte Vista Grove Homes
- Ron Wall, Axiom Healthcare Group
- Molly Forrest, Los Angeles Jewish Home for the Aging
- Felicia Price, LeadingAge California
- Tom Higgins, Wells Fargo Insurance Services, USA
- Patricia D Koscher, HAR-BRO Inc.
- Chris Regan, RN, BSN, Carmel Valley Manor
- John Cumming, Carlsbad by the Sea
- Luran Lea Pipes, Motion Picture & TV Fund
- Linda Hibbs, Webster House
- Sarkis Michael Garabedian, Ziegler
- James W. Graunke, Solheim Lutheran Home
- Christina Cerrato, Episcopal Communities and Services

**Organization names shown for identification purposes only*

MEMBER BENEFITS

BENEFITS OF BELONGING



PROVIDERS

- Career Center
- Committee Activities
- Communities Networking
- Provider Compensation Report
- ENGAGE Online Communities
- ENGAGE Magazine
- Late Breaking Regulatory & Legislative News
- Membership Directory
- Regional Networking and Education Research
- SNF Compliance Manual
- Value First Group Purchasing Program
- White Papers



RESIDENTS

- Advocacy Opportunities
- Crimestoppers Program



EVENTS

- LeadingAge California Annual Conference and Exposition
- Annual Policy and Leadership Summit
- Annual Affordable Senior Housing Conference
- Affordable Senior Housing
- Resident Advocacy Day



NEWS

- Leading News for Seniors
- Press Releases and Press Kit



EDUCATION

Leading Education

- Education and Events
- Conferences, Webinars and Regional Meetings
- Workforce Reference Materials



POLICY AND LEGISLATION

Leading Policy

- Abuse/Neglect Reporting Guide
- Clinical Excellence
- Crisis Communications
- Federal Requirements of Participation Reference Guide
- Five-Star Reports
- Healthcare Reform
- Legislative Advocacy
- Licensing
- New Models
- Policies and Procedures
- Products and Services
- Regulations
- SNF Compliance Guide
- Survey Assistance



LEADERSHIP

Cultivating Leadership

- Committees
- EMERGE
- Regional Meetings
- Scholarships



COMMUNITY SUPPORT

- Advocacy Opportunities
- Career Hub
- Community Locator Tool online
- Choosing a Non-Profit Consumer Guide
- Resource Listing

LeadingAge[®]
California

inspire...serve...advocate



A SPECIAL THANK YOU TO OUR CORPORATE PARTNER

THANK YOU TO OUR APPROVED VENDORS



THANK YOU TO OUR 2017 CONFERENCE SPONSORS:



We hope you will join us at our upcoming Policy & Leadership Summit and our Annual Conference in Pasadena, CA



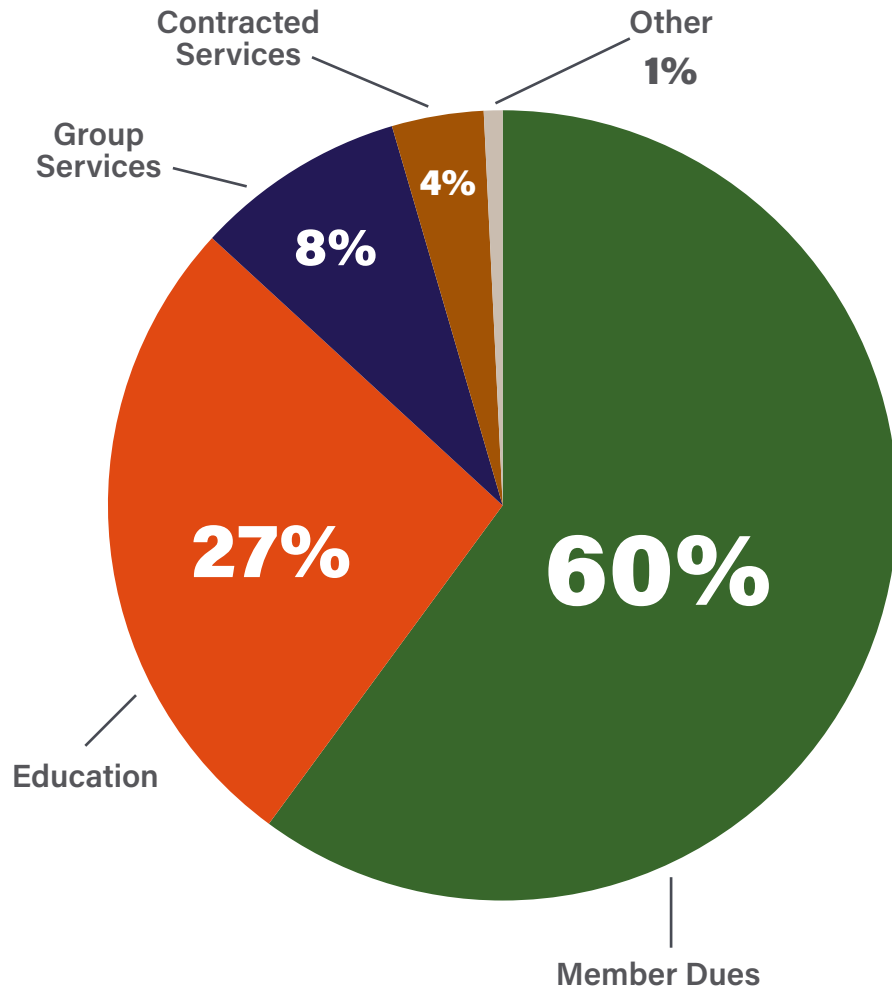
POLICY & LEADERSHIP
SUMMIT
February 12-14, 2018
Sacramento, CA



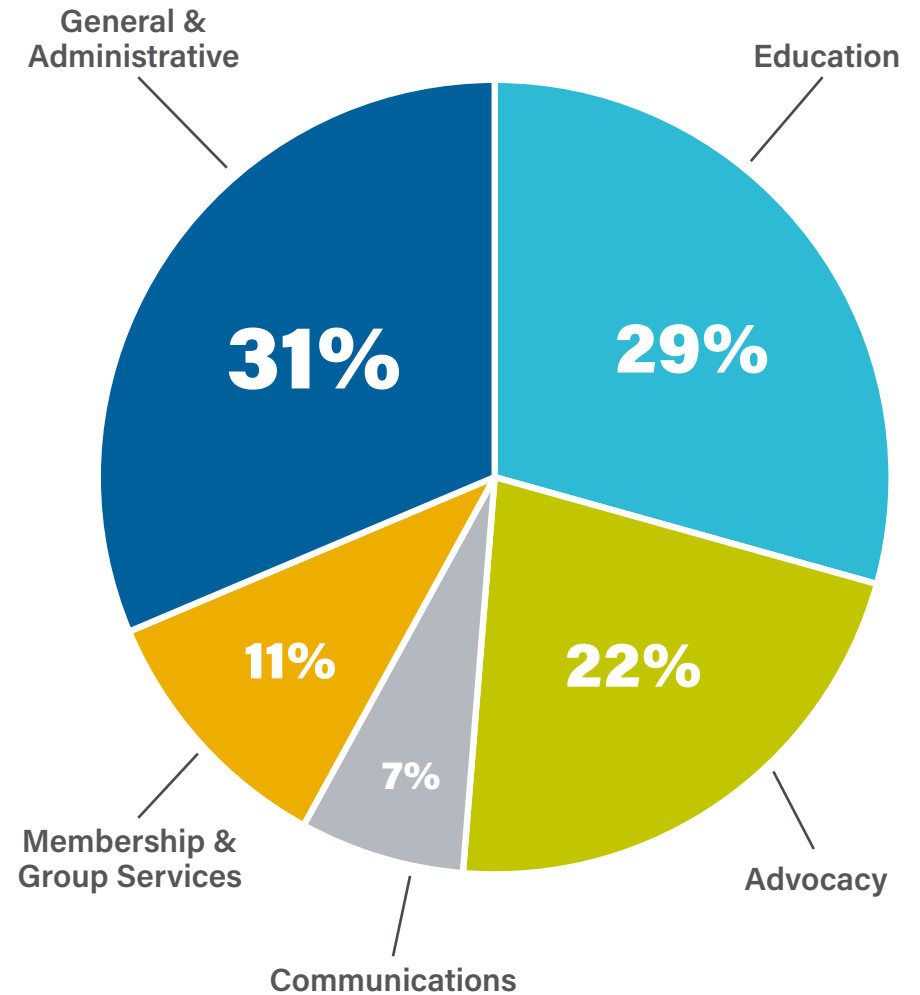
be extraordinary
Annual Conference & Exposition
May 7-9, 2018 • Pasadena, CA

2016-2017 FINANCIAL RESULTS

2016-2017 UNAUDITED REVENUES



2016-2017 UNAUDITED EXPENSES



LeadingAge® CA

Staff Directory

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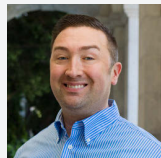
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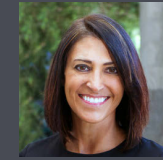


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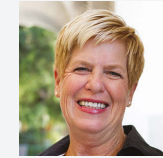
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