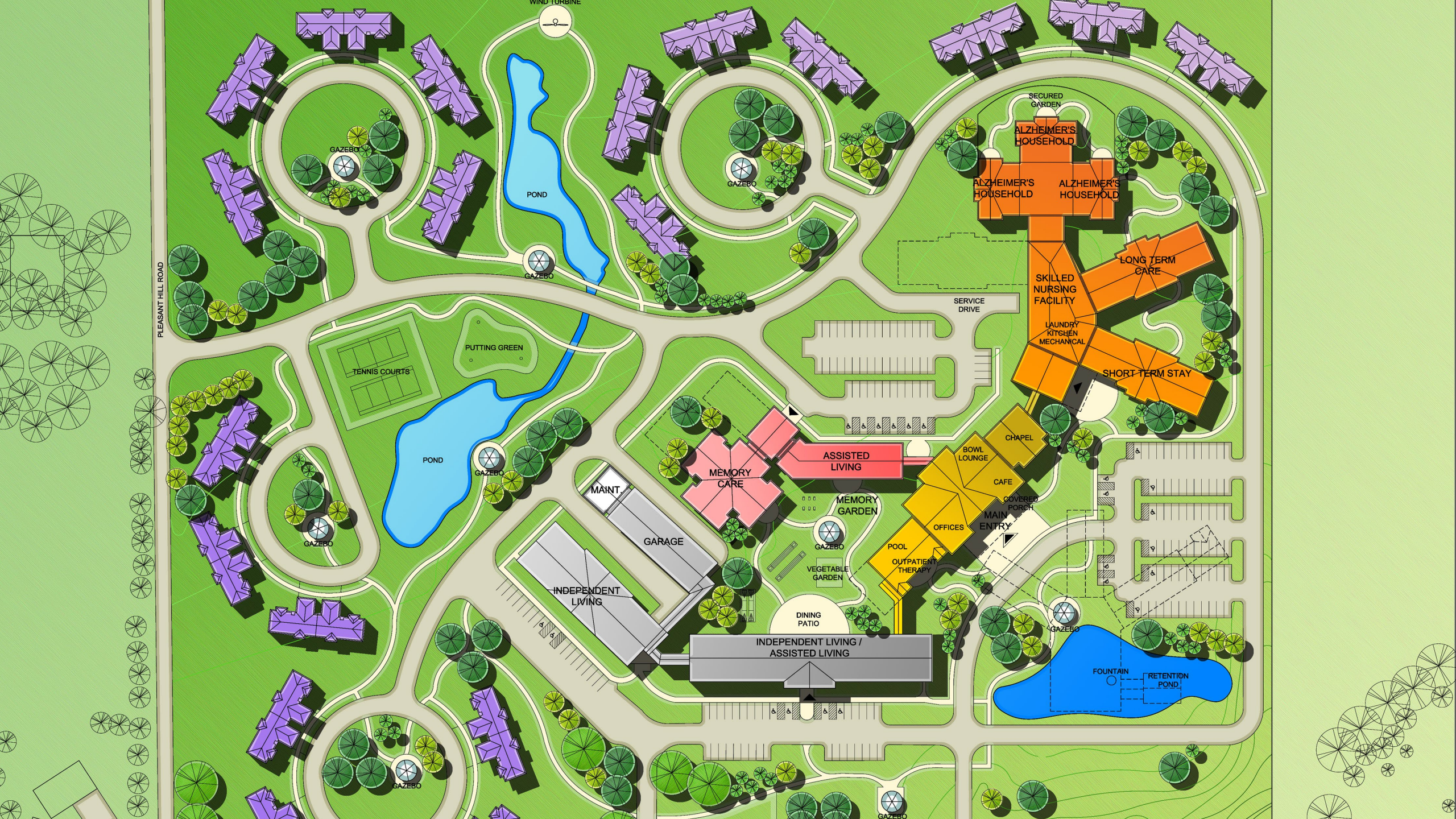




How to use **informed data** **to choose the best master plan** for your community

LeadingAge IL 2023



PLEASANT HILL ROAD

POND

GAZEBO

GAZEBO

PUTTING GREEN

TENNIS COURTS

POND

GAZEBO

GAZEBO

MAINT.

GARAGE

INDEPENDENT LIVING

MEMORY CARE

ASSISTED LIVING

MEMORY GARDEN

GAZEBO

VEGETABLE GARDEN

DINING PATIO

INDEPENDENT LIVING / ASSISTED LIVING

SERVICE DRIVE

ALZHEIMER'S HOUSEHOLD

ALZHEIMER'S HOUSEHOLD

ALZHEIMER'S HOUSEHOLD

SKILLED NURSING FACILITY

LONG TERM CARE

SHORT TERM STAY

LAUNDRY
KITCHEN
MECHANICAL

BOWL LOUNGE

CHapel

CAFE

COVERED PORCH

OFFICES

POOL

OUTPATIENT THERAPY

MAIN ENTRY

GAZEBO

FOUNTAIN

RETENTION POND

WIND TURBINE

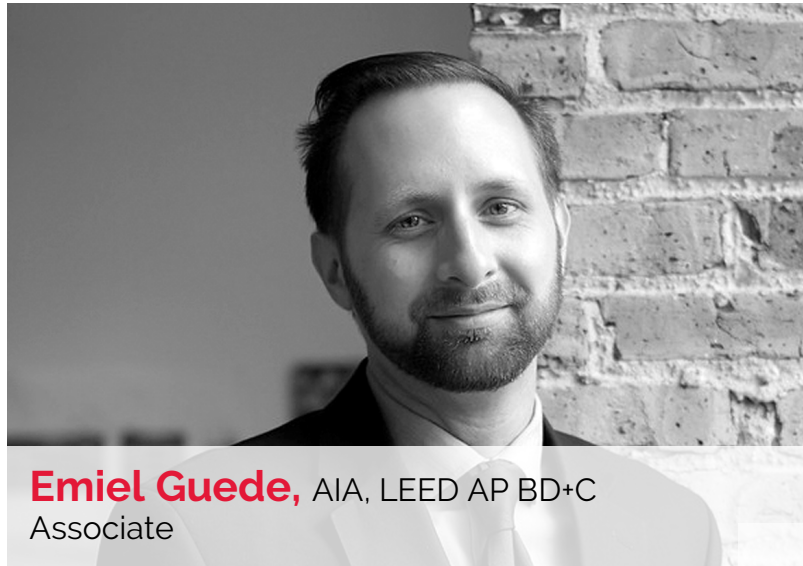
WHO WE ARE



Scott Likins, AIA
Principal, Dir. Senior Living Design Group



Chris Lee
Interior Designer



Emiel Guede, AIA, LEED AP BD+C
Associate



Rachel Emmons
Cost-Benefit Analysis Expert

Agenda

Where are we?

Where do we want to go?

How do we get there?

WHERE are we?

OUR LONG-RANGE FACILITY PLANNING PROCESS





Existing Conditions Assessment

Building Components

Electrical

Exterior
Wall

Fire
Detection

HVAC

Interior

Lighting

Plumbing

Roof

Site
(Safety/Access)

Building
Envelope

Facility
Security



Existing Conditions Priorities



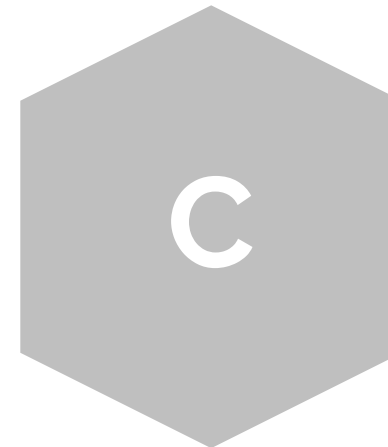
Necessary

This category records items, such as IDPH/CMS tags and items that still function as intended or remain code compliant, but exhibit signs of fatigue, failure, stress and may become unsafe or no longer code compliant in the foreseeable future.



Recommended

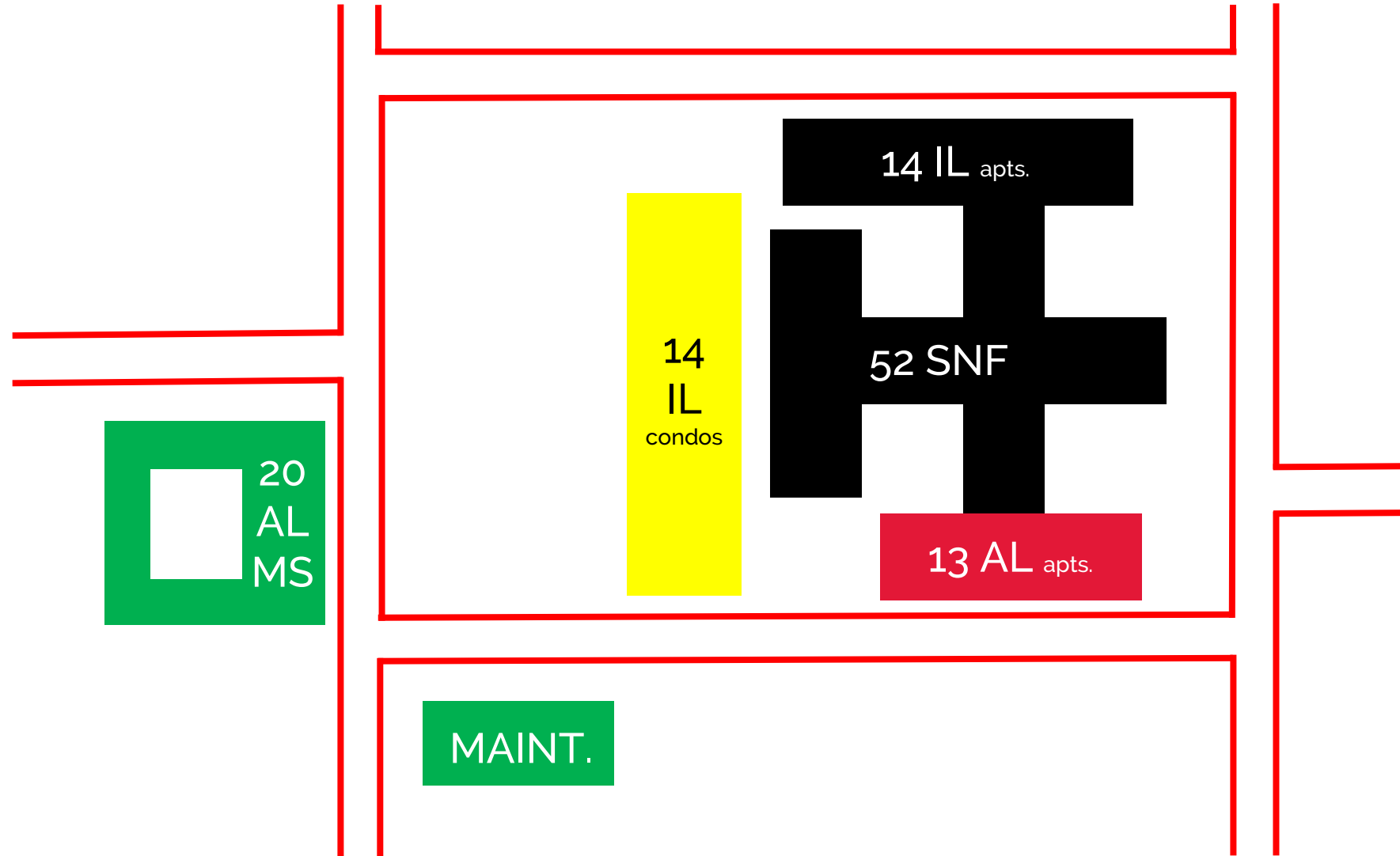
This category includes items that do not currently exhibit fatigue, stress or failure, but are reaching the end of their useful lives and ought to be included on a schedule for periodic building renewal.



Capital Improvements

This category includes items that may currently function, but the community may be better served in the long run to consider replacing or correcting.

Case Study Site Plan





Existing Conditions Assessment Facility Summary

Facility	1-5 Years	6-10 Years	11-20 Years	20+ Years	Total	% of Building Total	\$/Sq. Ft.
IL Condos	\$426,120	\$247,490	\$0	\$0	\$673,610	12.8%	\$29.29
Assisted Living	\$532,530	\$43,600	\$0	\$0	\$576,130	11.0%	\$61.95
Skilled Nursing	\$2,888,870	\$311,720	\$85,000	\$0	\$3,285,590	62.6%	\$115.85
Independent Living	\$451,787	\$260,100	\$5,000	\$0	\$716,887	13.6%	\$61.93
Maintenance Building			\$0	\$0	\$0	0.0%	\$0
Memory Support			\$0	\$0	\$0	0.0%	\$0
Totals	\$4,299,307	\$862,910	\$90,000	\$0	\$5,252,217		\$4.99



Functional Performance Assessment

Does the environment support the community's needs?

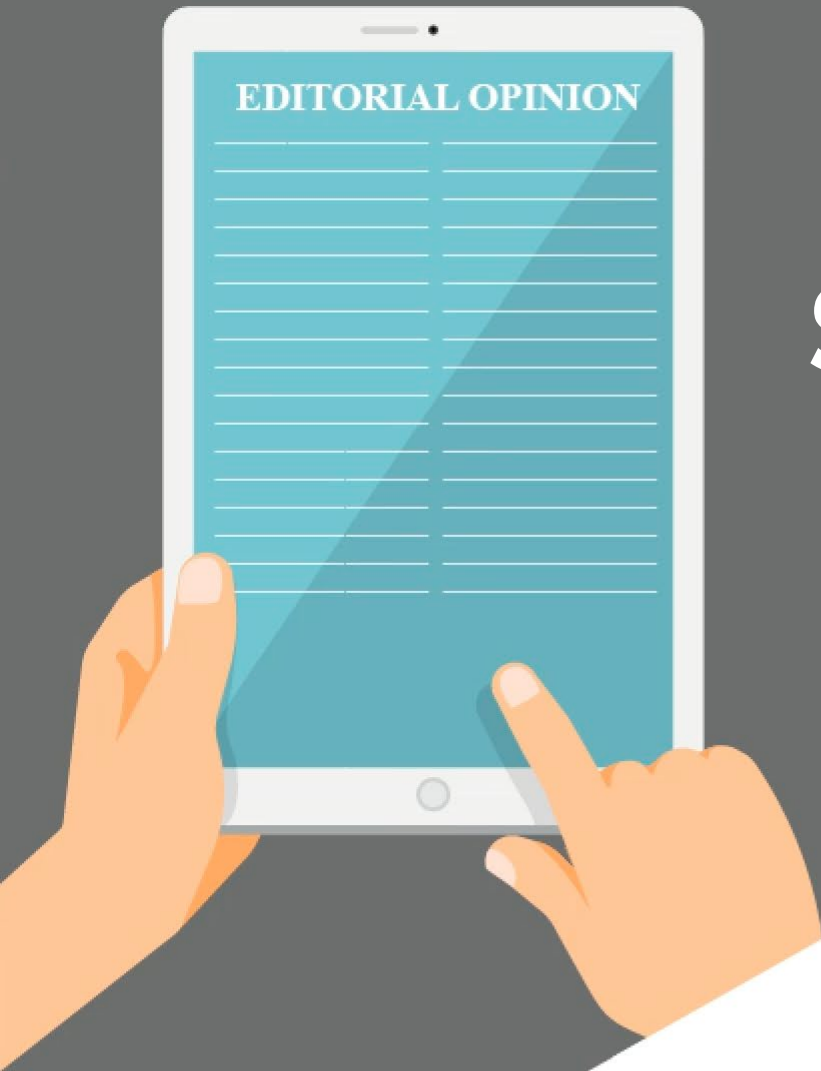
- Adequate space for care delivery
- Appropriate spaces for the populations served
- Capacity and utilization
- Changing demographics and proximity to the larger community
- Efficient and safe care delivery
- Minimizing non-critical operations effort

EDITORIAL OPINION

SUBJECTIVE



OBJECTIVE



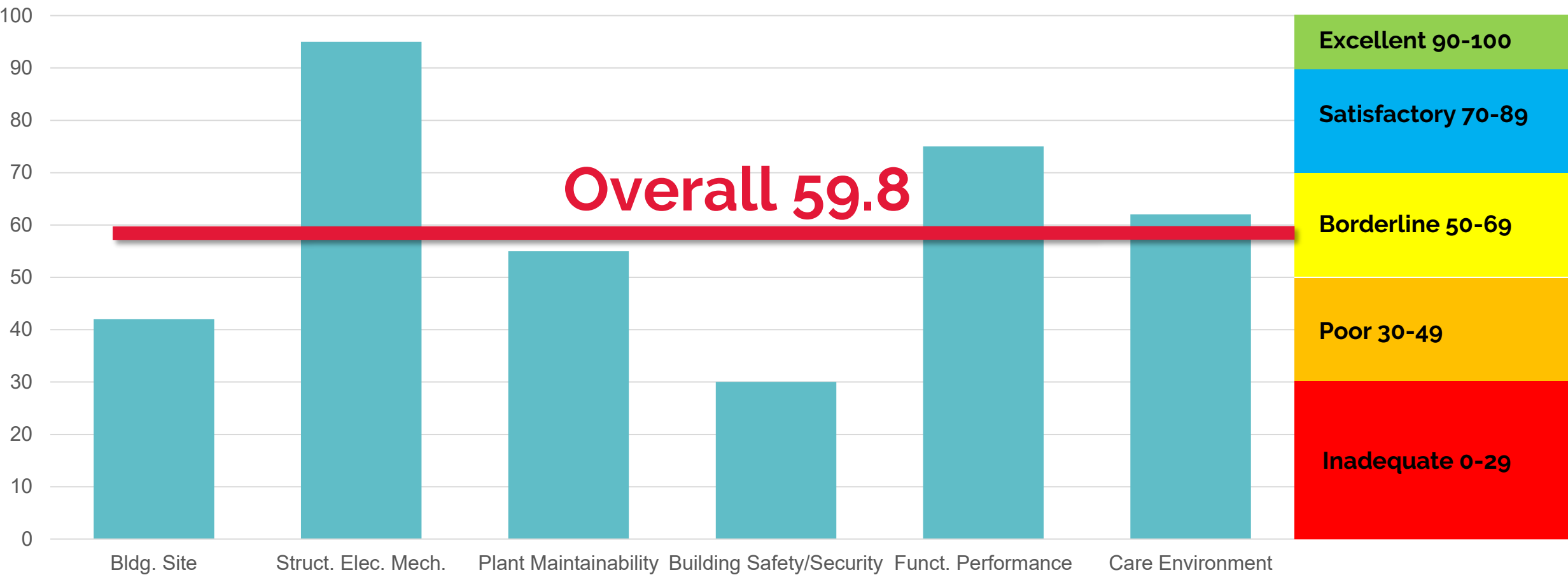
Functional Performance Assessment: Criteria

Section	Question	Total Points Possible
1	The Site: The site is an integral part of the community and is a basic feature of the living and care environment. A resident's living and staff's working experience as well as community interface will be strengthened or limited by the adequacy of the site.	100
2	Building Systems (Infrastructure): These are basic functions of a community's operation and will have an impact on future maintenance costs and the ability to accommodate changes in its delivery of living and care programs.	200
3	Building Maintainability: This category refers to the cost or ease with which building systems and architectural elements can be kept in good working order or in a good state of repair by community personnel. Evaluate the condition of the building and not the manner in which the maintenance staff performs their duties.	50
4	Building Safety and Security: The safety and security of residents, staff and visitors is vital to a positive and successful living and working experience. Does the building contribute to and support a safe and secure experience?	200
5	Functional Performance: This category is determined by comparing the physical requirements necessary to support the living/work environment and care delivery plan with the existing physical elements of the building itself.	250
6	The Environment: This category evaluates how well the environment, both inside and out, creates a positive atmosphere for living and care delivery for all residents, staff and visitors.	200

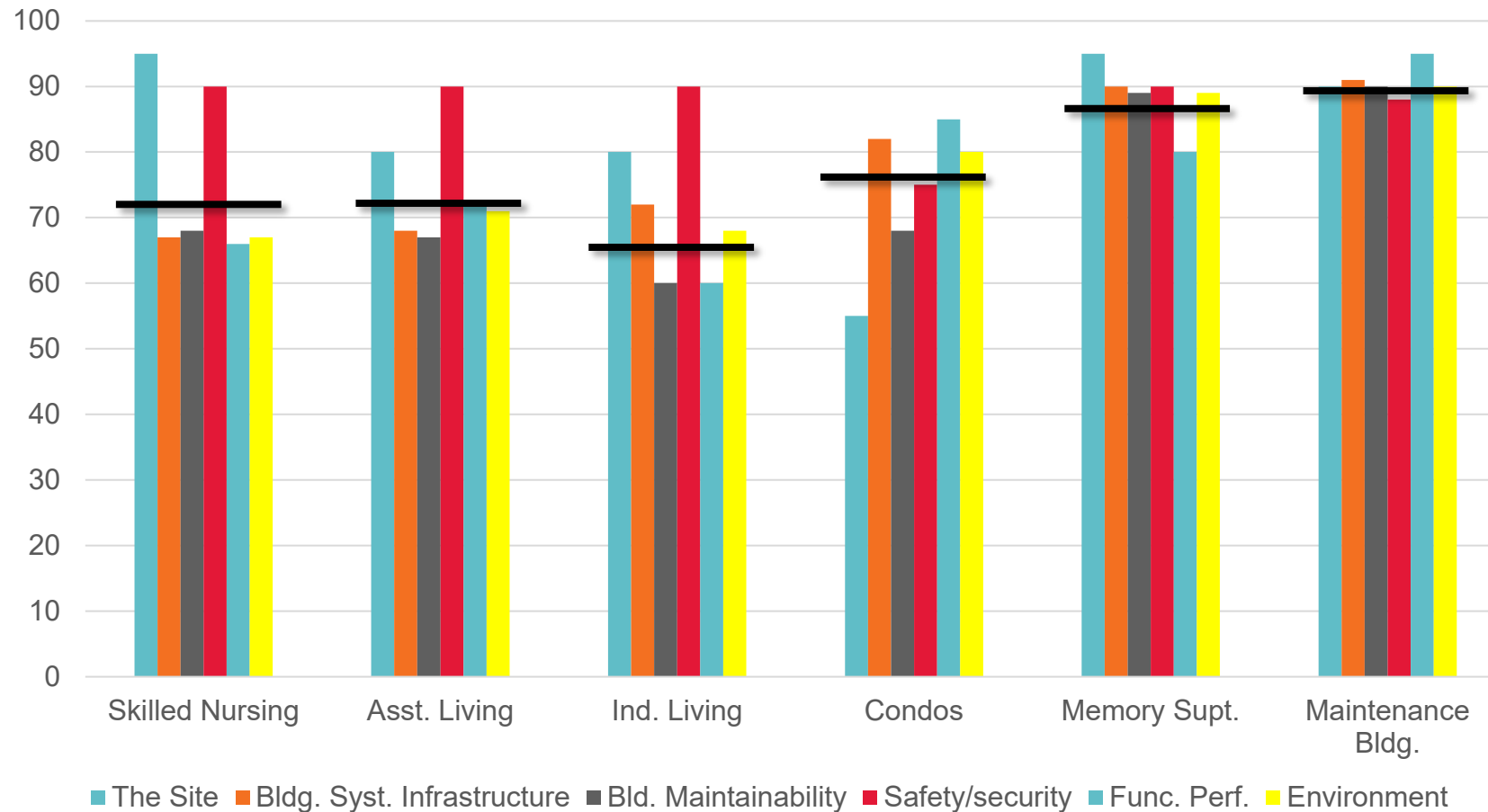
Sample Functional Performance Assessment: Skilled Nursing

Section	Question	Total Points Possible	Total Points Earned	Rating
Section 1	The Site: The site is an integral part of the community and is a basic feature of the living and care environment. A resident's living and staff's working experience as well as community interface will be strengthened or limited by the adequacy of the site.	100	94	
1.1	Site is large enough to meet living and care needs as defined by programming and local requirements.	15	12	B- Satisfactory
1.2	Site is easily accessible, conveniently located for present / future population & has appropriate community connections.	15	15	A- Excellent
1.3	Location is removed from undesirable business, industry, traffic, natural hazards, and areas of crime.	10	10	A- Excellent
1.4	Site entry is easily identifiable, site circulation is easily navigable and well lit, and wayfinding is intuitive.	10	10	A- Excellent
1.5	Site is well landscaped and developed to meet program needs.	10	10	A- Excellent
1.6	Well equipped recreational areas are adequate with easily accessible/navigable well lit circulation routes.	5	5	A- Excellent
1.7	Topography is varied enough to provide adequate drainage and without steep inclines.	5	5	A- Excellent
1.8	Site has stable, well drained soil free of erosion.	5	5	A- Excellent
1.9	Site is suitable for special programming needs, e.g., outdoor activities.	10	10	A- Excellent
1.10	Pedestrian services include adequate well-lit sidewalks with designated crosswalks, curb cuts, and correct slopes.	5	4	B- Satisfactory
1.11	Sufficient on-site, well lit solid surface parking is provided for visitors, staff and residents.	10	8	B- Satisfactory

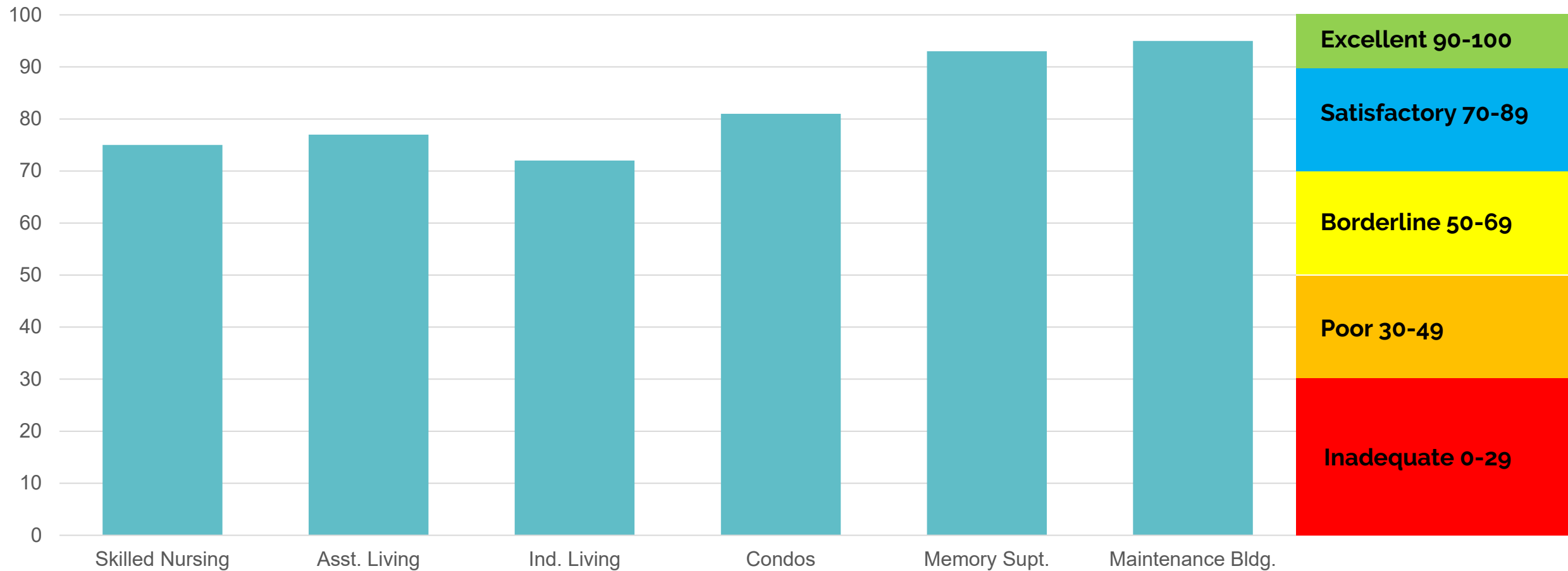
Sample Functional Performance (one building)



Sample Functional Performance (by section)



Sample Overall Functional Performance



NAMED SECOND
BEST
INNOVATION
IN AEC INDUSTRY
BY BD+C
MAGAZINE



master plan modeling and analysis software



Typical Data Collected

General

- Facility
- Populations Served
- Bed Count
- Census
- Square Footage
- Utilization

Costs

- First Costs
- Operations & Maintenance
- Energy Costs
- Building Renewal Costs

Functional Performance

- The Site
- Building Systems
- Maintainability
- Building Safety and Security
- Func. Perf. Score
- The Environment

1

How much does
it cost to
implement and
operate?

Life-Cycle Costs

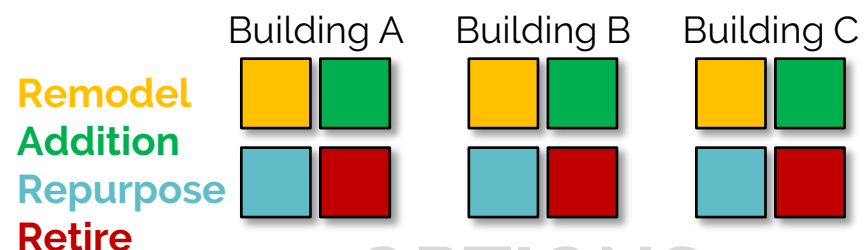
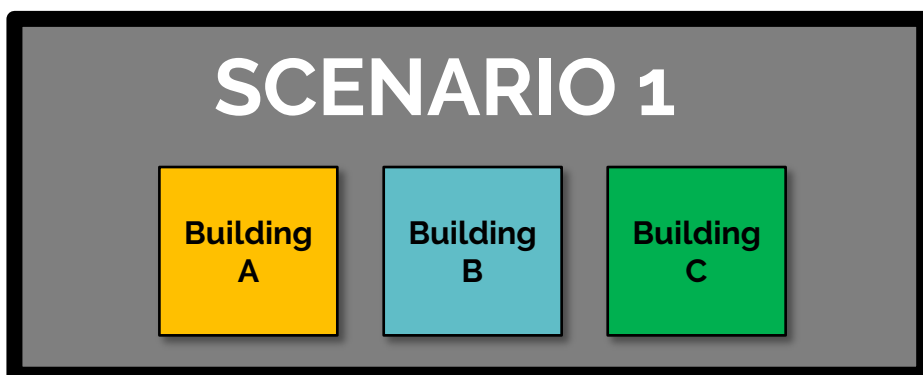
2

How well does
it function as
a facility?

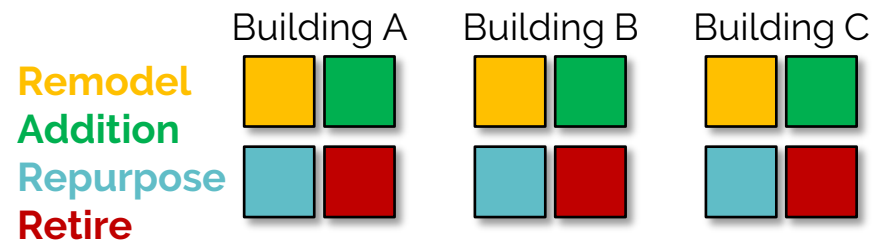
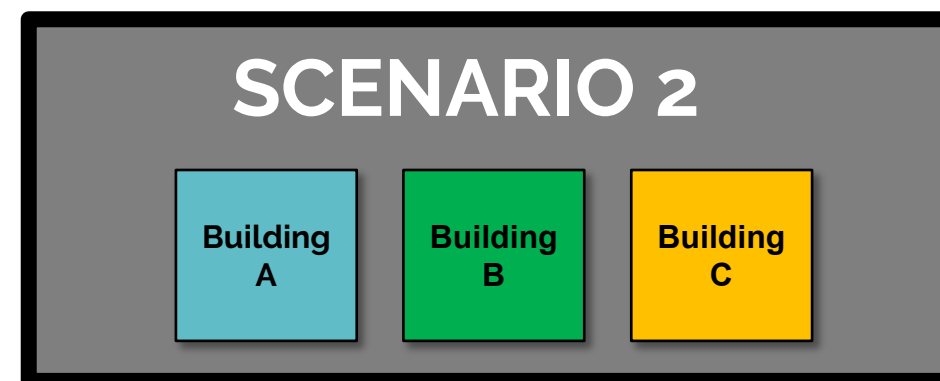
Funct. Performance



Sample What-If Scenarios



OPTIONS



OPTIONS

Update Scenario

View Planning Consideration

Back ↩

Scenario Name*

Planning Consideration*

Include In Modeling ☒

Status Quo

Select Sc ▾

Add

<

>

Functional Performance

Square Footage

First Costs

Life Cycle Costs

CBR

83.1

92,235

\$6,992,112

\$88,879,054

34.5

Option		Facility Type	Capacity	Square Footage	First Costs	Functional Performance
Status Quo ▾		Skilled Nursing	52	28,360	\$4,374,003	75
Status Quo ▾		Memory Support	21	14,000	\$0	94.2
Status Quo ▾		Assisted Living	14	9,300	\$766,984	76
Status Quo ▾		Other	0	6,000	\$0	98.2
Status Quo ▾		Independent Livir	17	23,000	\$896,756	81.4

☐ View all Scenarios

Skilled Nursing 1
Memory Support 1
Assisted Living 1
Other 1

Capacity 120

Occupancy 200

+/- Capacity:-80

Print

Update

Update & Exit

View Summary

Cancel

Sample
Status Quo
Scenario
Summary



REPORT FINDINGS

This community:

- Provides high-quality care
- Has appropriate nursing staff
- Has better occupancy than most
- Has low employee turnover



REPORT FINDINGS

Additionally:

- Nursing beds have had high occupancy
- AL rooms experienced very high occupancy
- IL was hurt by COVID, but recovering
- Newer Memory Care were filled well, through COVID
- SNF private pay has been very strong
- SNF lost \$1M last year

Nursing Facilities have been closing for 20 years

Number of
Illinois
Nursing
Facilities

827

869

787

762

686

682

1995

2000

2010

2015

2020

4/10/2022

Number of
USA Nursing
Facilities

16,389

16,886

15,690

15,656

15,029

14,911

1995

2000

2010

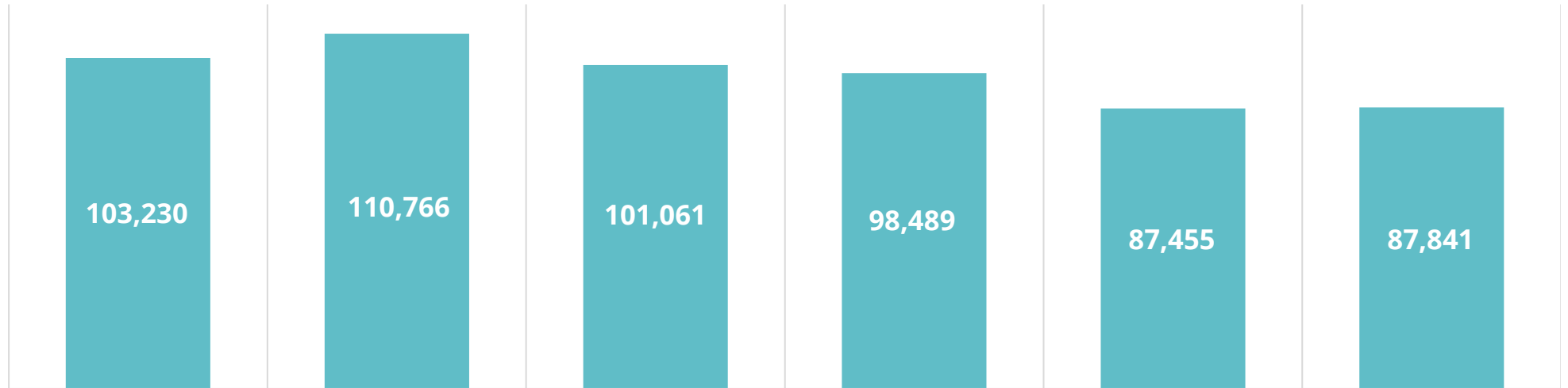
2015

2020

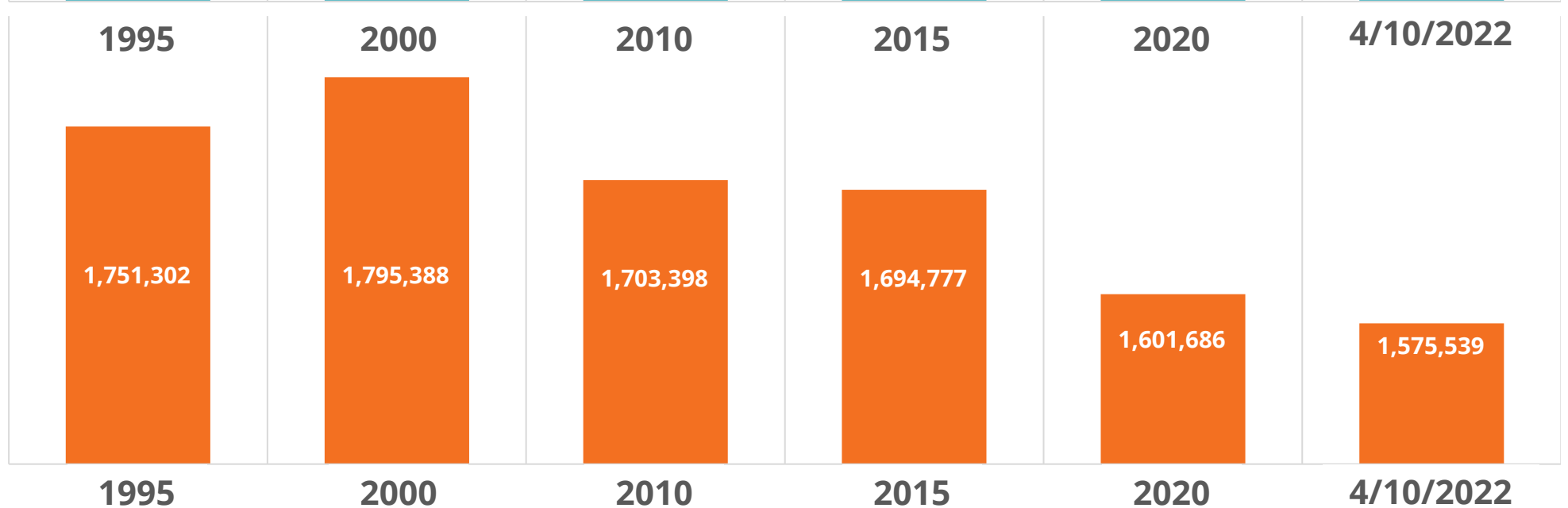
4/10/2022

Licensed Beds have been declining for 20 years

Number of
Illinois NF
Licensed Beds

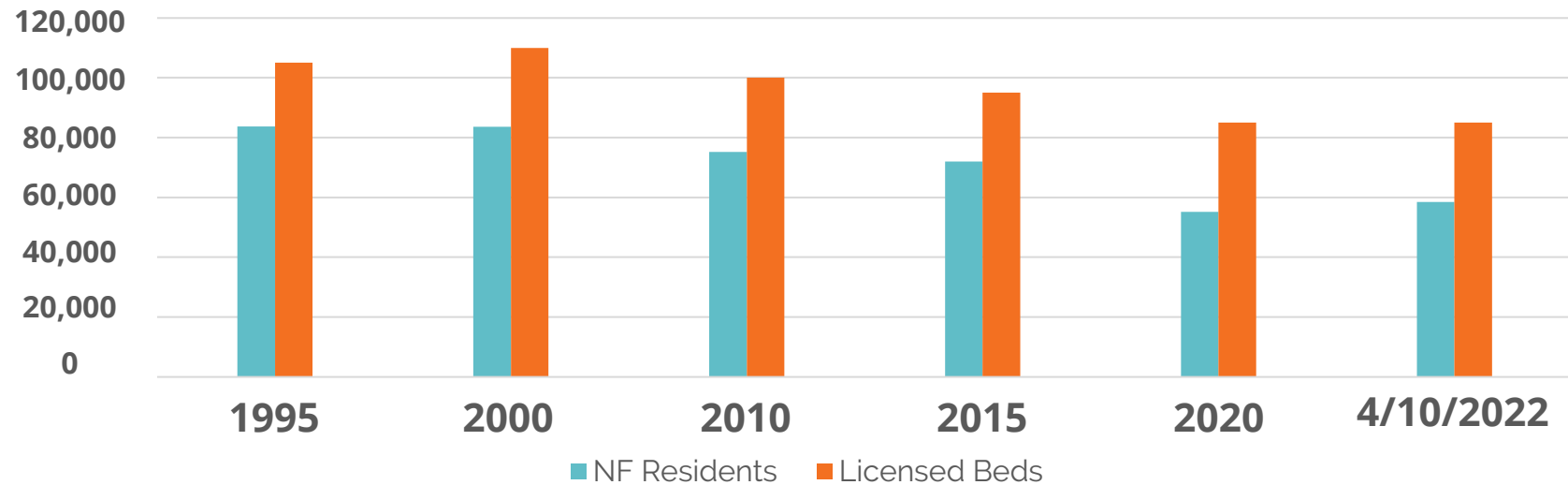


Number of
USA NF
Licensed Beds

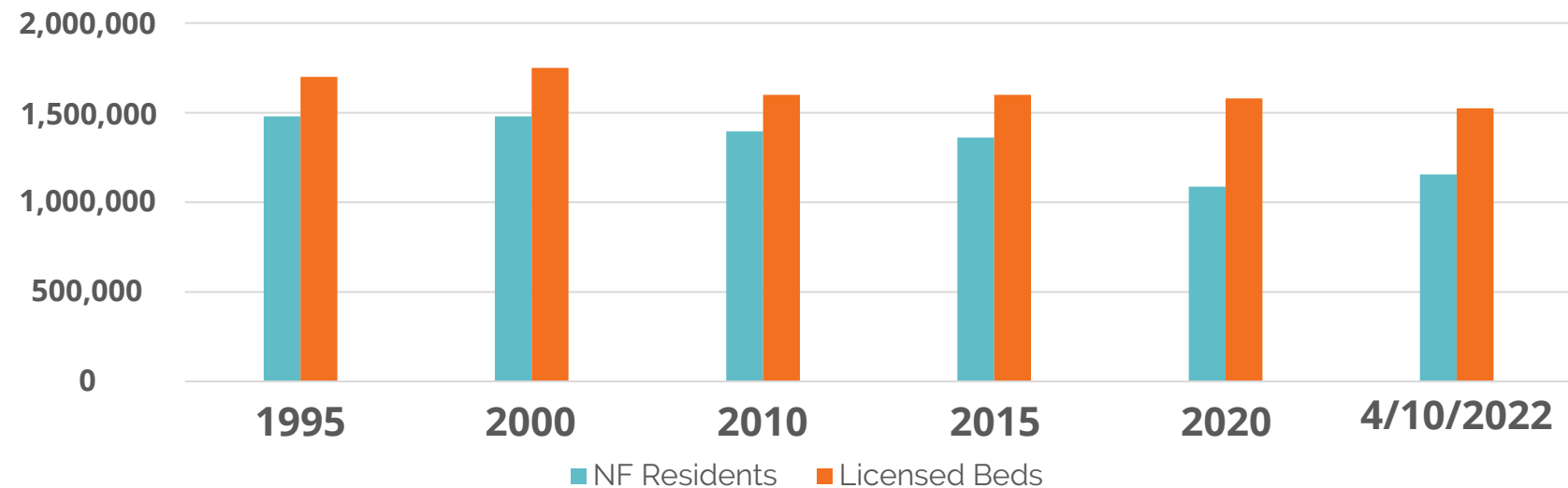


SNF Residents have been declining for 25 years

Number of
Illinois NF
Residents
compared to
Licensed Beds



Number of
USA NF
Residents
compared to
Licensed Beds



SNF Occupancy has been declining for 25 years

Illinois
Occupancy
Percentage
Rate

81.1

75.5

74.4

73.1

63.1

66.6

1995

2000

2010

2015

2020

4/10/2022

USA
Occupancy
Percentage
Rate

84.5

82.4

82

80.3

67.9

73.3

1995

2000

2010

2015

2020

4/10/2022

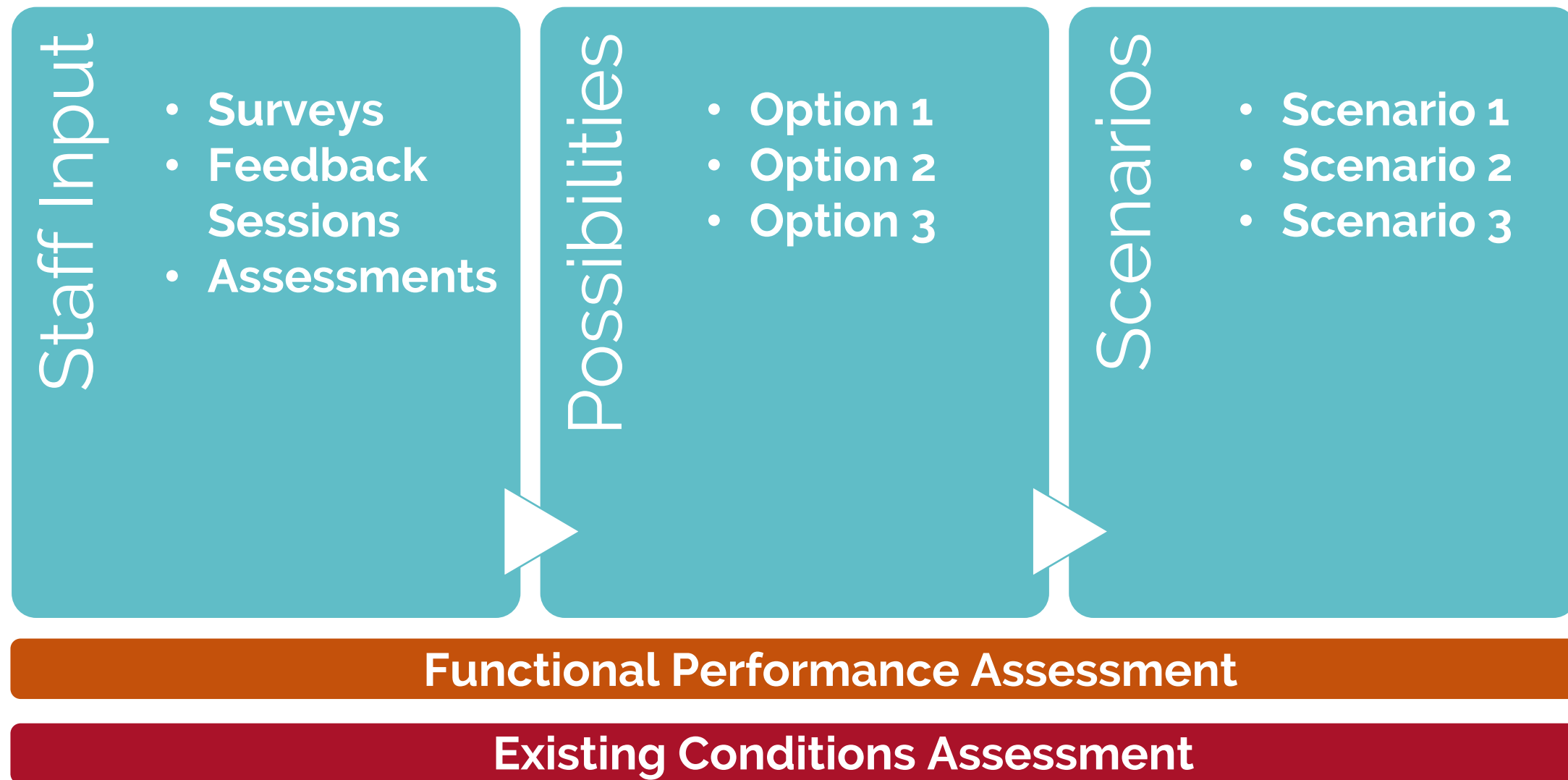
WHERE do we
want to go?

Staff & Leadership Engagement Summary





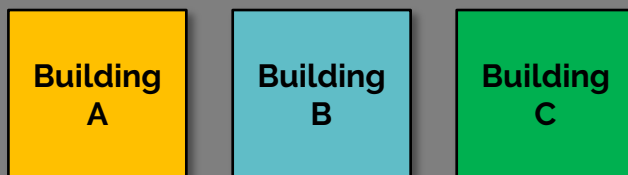
Sample Master Plan Scenario



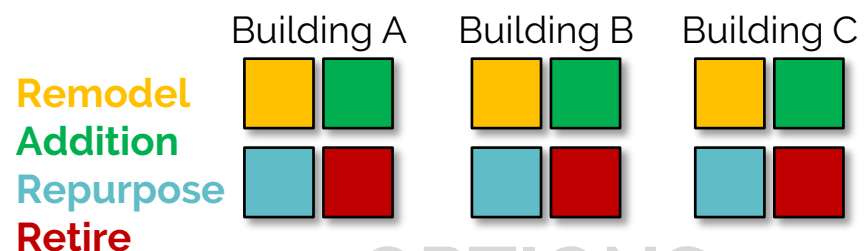
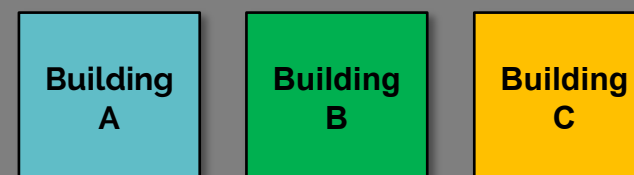


Sample What-If Scenarios

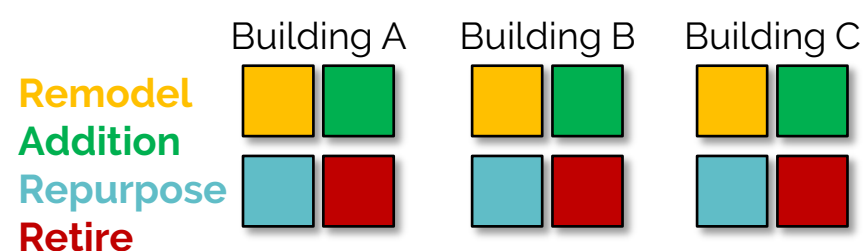
SCENARIO 1



SCENARIO 2



OPTIONS



OPTIONS

DATA INPUT

Master Data

Facilities

Options

Scenarios

ANALYSIS

Reports

Scenarios

Planning Consideration

Select planning consideration

CBR/Sq.Ft

CBR/Occupancy

Refresh

Create New Scenario

10

Compare LCCs

Compare Operating Costs

Compare Functional Performance

Compare CBR/Sq.Ft

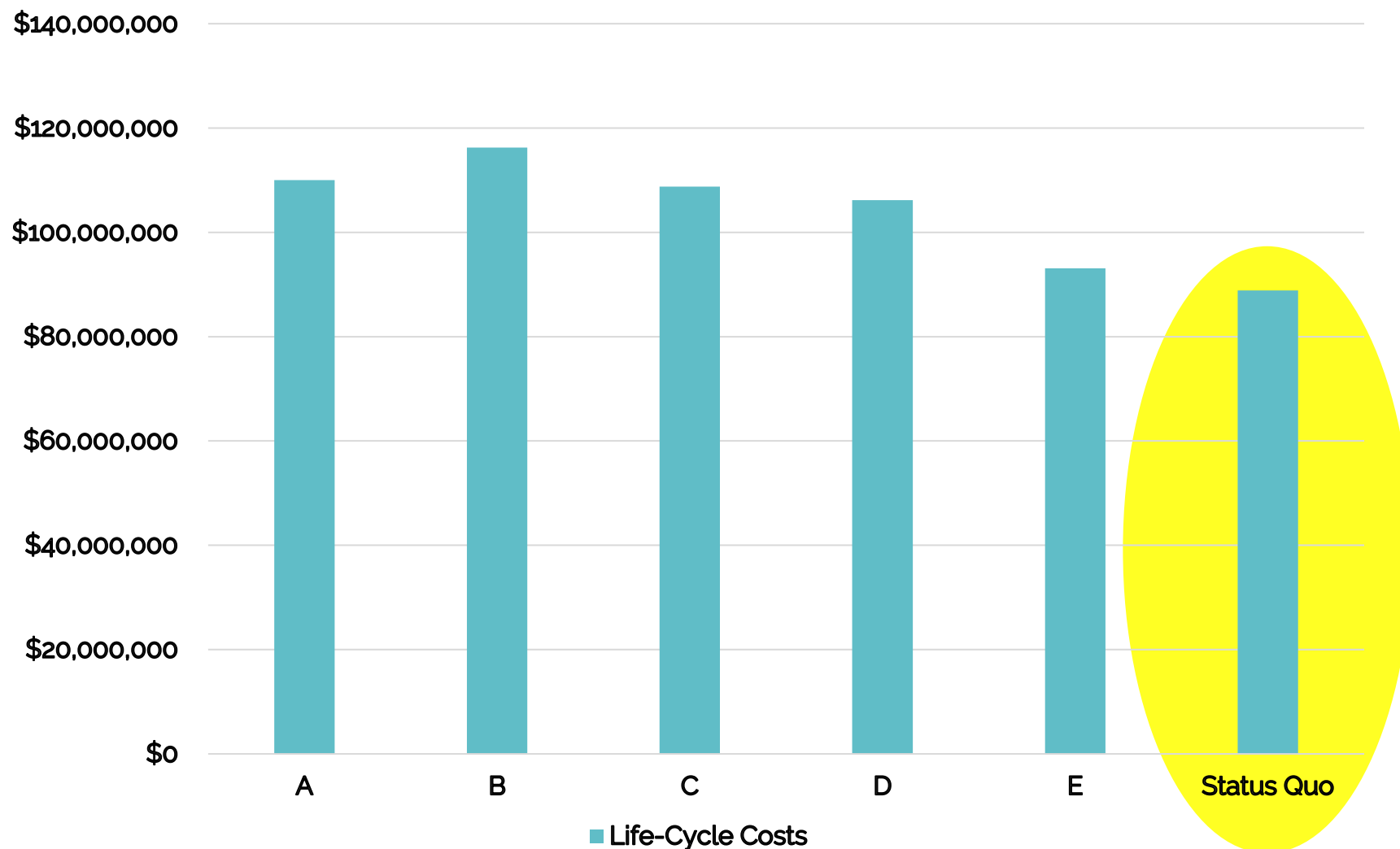
Search...

Sr. No. ^	Planning Consideration v	Scenario Name v	First Costs v	Square Footage v	Life Cycle Cost v	Functional Performance v	CBR v	
1	Entire Community	Status Quo	\$6,992,112	92,235	\$88,879,054	83.1	34.5	
2	Entire Community	Scenario A	\$32,926,969	138,750	\$110,023,512	94.4	47.6	
3	Entire Community	Scenario B	\$28,521,859	119,210	\$116,247,928	92.8	38.1	
4	Entire Community	Scenario C	\$32,293,858	133,750	\$108,793,490	94.4	46.4	
5	Entire Community	Scenario D	\$31,072,191	128,750	\$106,191,470	94.4	45.8	
6	Entire Community	Scenario E	\$18,279,974	101,510	\$93,082,920	89.3	39.0	

Sample Scenario Summary

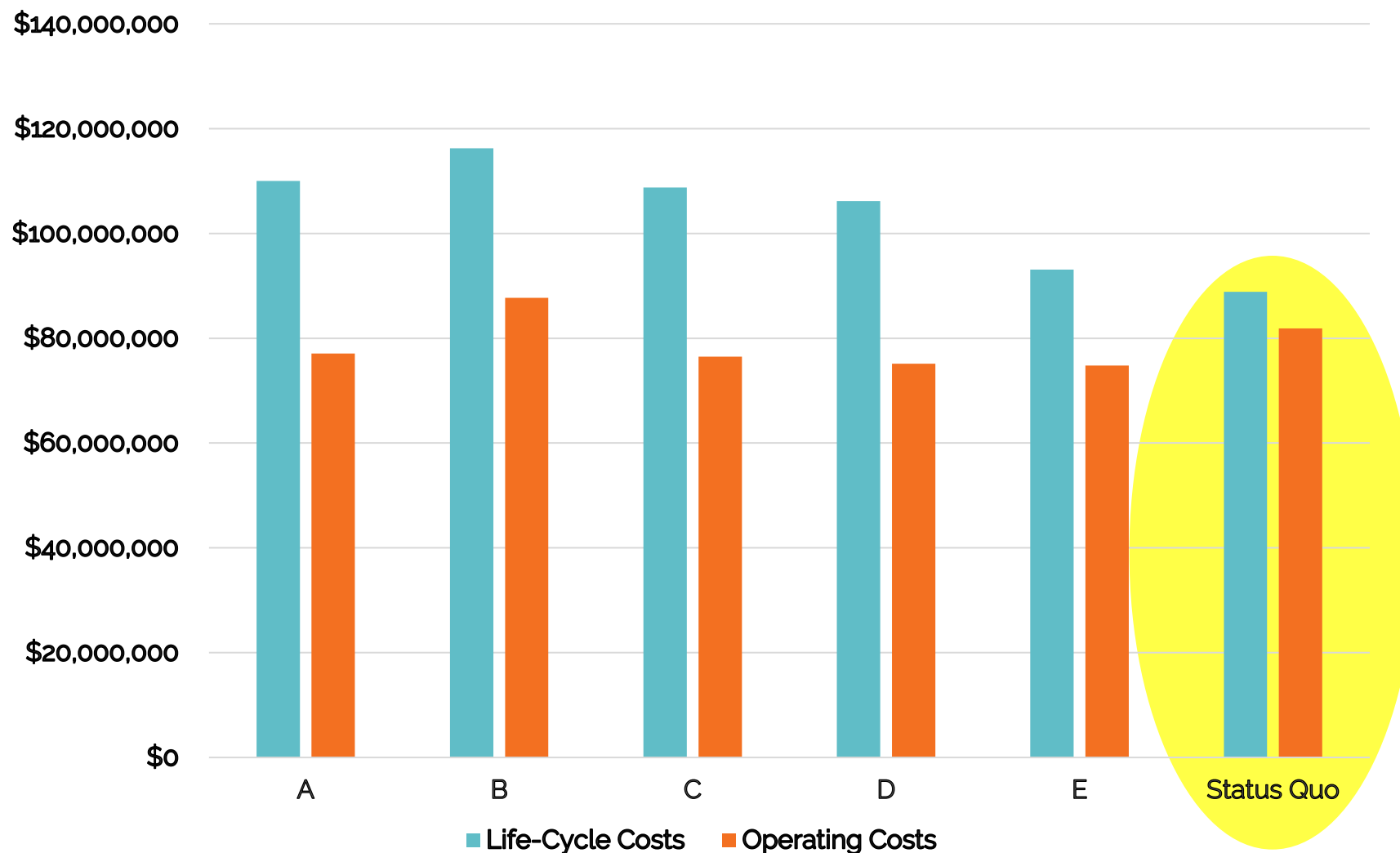


Scenario Life-Cycle Costs



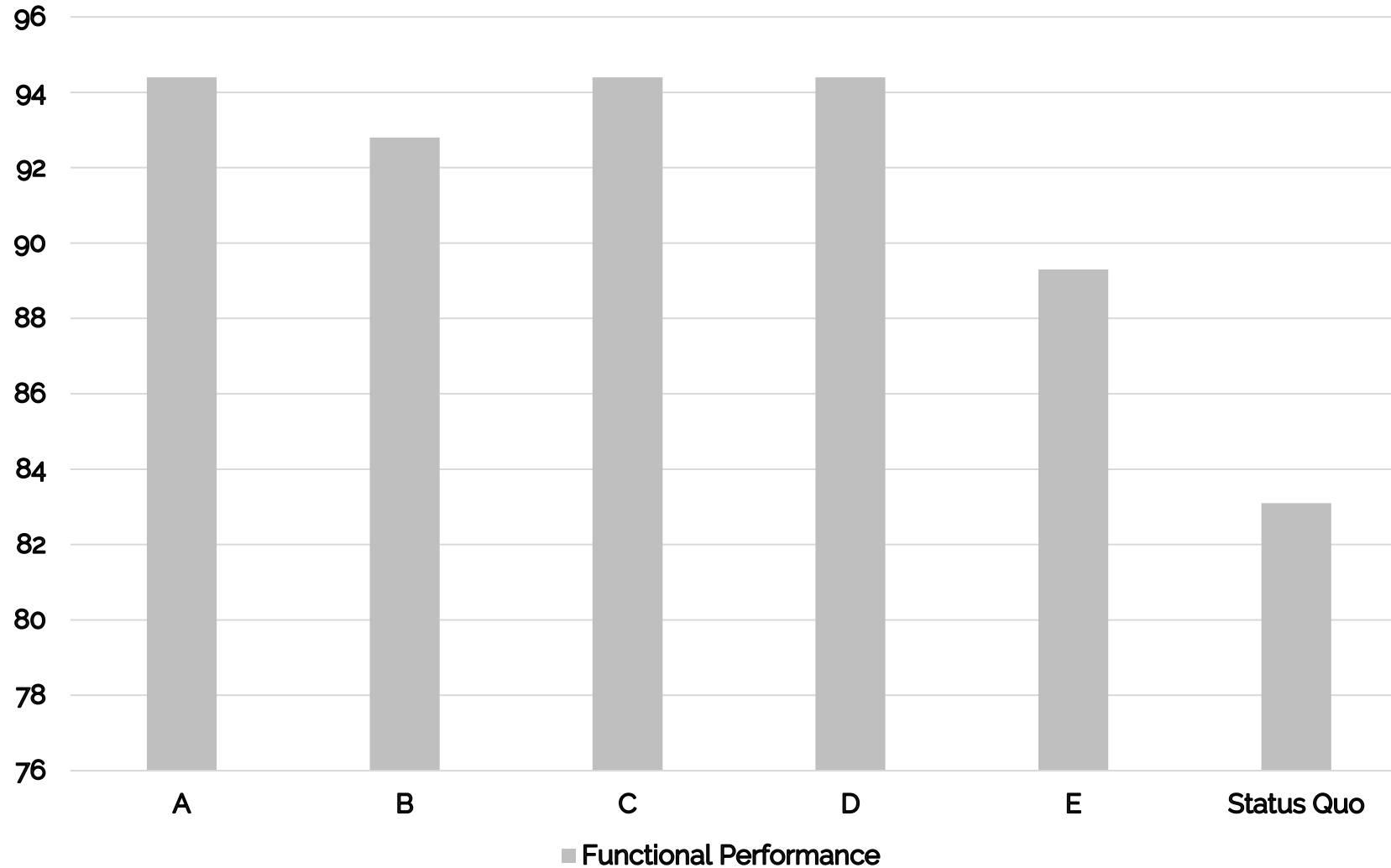


Scenario Operating Costs



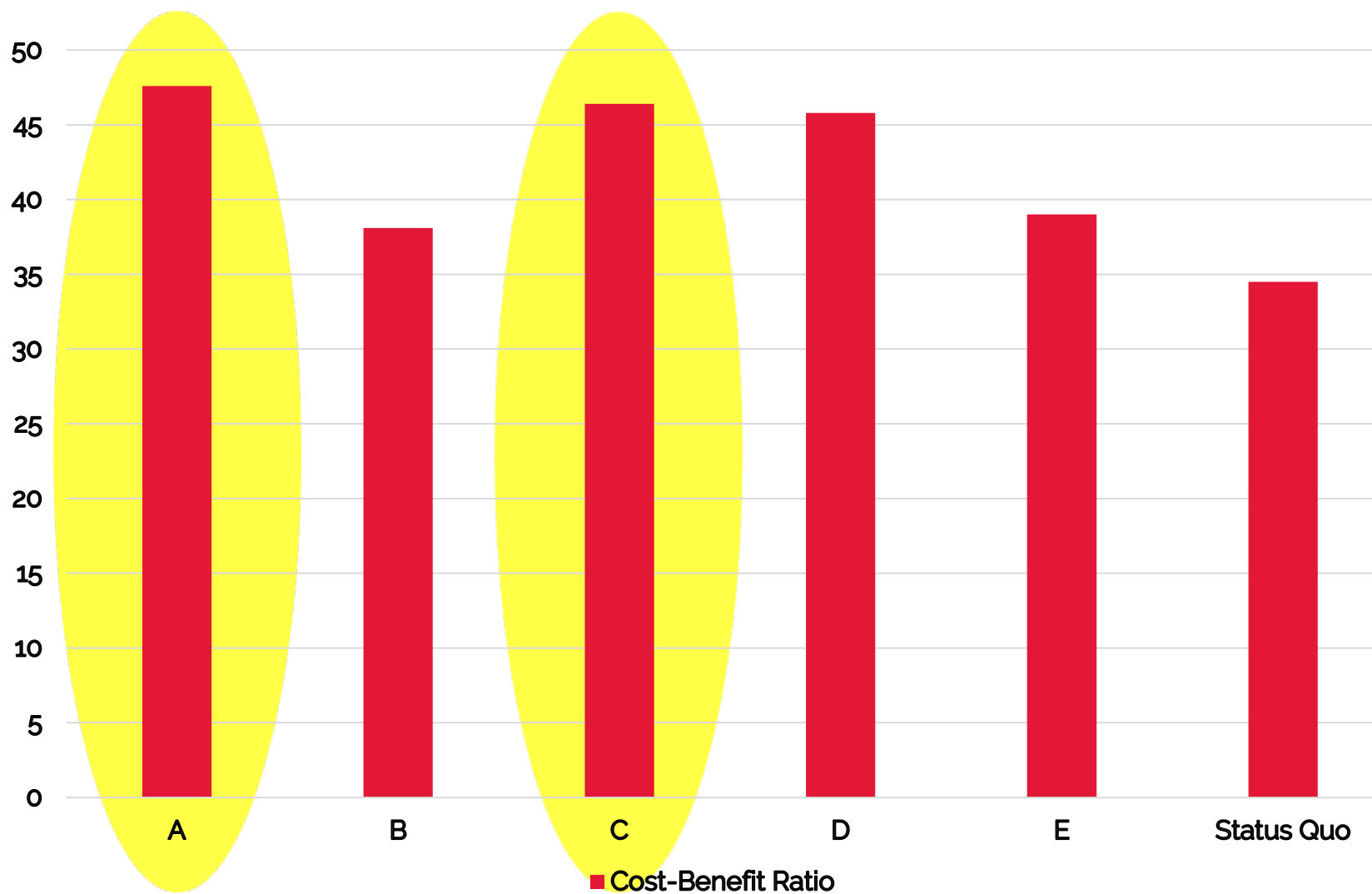


Scenario Functional Performance





Scenario Cost-Benefit Ratios



HOW do we
get there?



How Do We Get There?

Currently, the Community:

- Does not produce cash flow that would support any meaningful debt.
- Will need to shift services to generate positive revenue.
- Will need to carefully consider a phased approach.



BENEFITS OF A DATA-DRIVEN APPROACH

- Creates a roadmap for **future-focused buildings**, optimally configured
- **Data-driven**: makes the business case and removes emotional bias
- Builds internal/external **support**
- Helps organizations **move forward with confidence**
- **More dollars** to impact your MISSION!

Summary

Where are we?

Where do we want to go?

How do we get there?



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