

## In this ISSUE...

The Shelter Group has been awarded a 2016 Top Workplace honor for the Most Ethical Workplace by The Baltimore Sun.

This is extraordinary, but what makes us most proud is that the recognition is based solely on the results of associate feedback.

Below is my response to a question The Sun posed in connection with the Top Workplace competition, "How do you create an ethical workplace?"

Integrity and transparency have been hallmarks of The Shelter Group since the company was founded nearly 35 years ago.

I was the first associate hired and can confidently say that we have never wavered in that commitment.

We make business decisions that take into account far more than a bottom line. We look at how our actions will impact our associates, our residents, and the greater community. Our goal has never been to get to a certain size, scale or financial target.

Instead, we've always focused on building a great company for the long term and on ethical and transparent business practices. That means operating in an open, honest and transparent way that makes our associates, residents, families, and investors proud.

In the fall of 2015, we made a decision to sell our affordable housing portfolio in order to focus all of our efforts and attention on our Brightview Senior Living business.

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Marilynn Duker  
President, The Shelter Group



*"It is a total team effort," says Martha McClung, Director of Vibrant Living. "The orientation process for new residents just keeps getting better and better."*

## SPOTLIGHT

## Flourishing at Brightview

For residents and their families reaching the decision to make a move can sometimes be difficult.

Most often, residents are moving to a Brightview community from their home—perhaps one they've lived in for 40 or 50 years. Staying put may be the preferred option.

Then, upon move-in, navigating a new neighborhood, making new friends, and feeling that you belong can be additional hurdles.

It may only take a day or two to move but truly feeling part of the community can take much longer.

*Flourishing at Brightview* is Brightview's unique program to enhance a new resident's experience—before, during, and after move-in to make the transition a success.

Initially created by a committee of Executive Directors, Community Sales Directors, Vibrant Living Directors, Regional Directors of Operations, and Subject Matter Experts, *Flourishing at Brightview* is designed to build meaningful relationships with new residents and help them acclimate to their new home and community.

Because no two residents are alike, the program is customized for residents, families, and communities. The roles and tasks of each director also varies by department, needs of the individual resident, and their level of service.

Divided into three parts—after the deposit, move-in day and the first 60–90 days—the program is continuously reviewed and optimized so it aligns

with resident and family needs. In addition, the program is flexible so it can be further customized for residents, families, and communities.

Brightview's directors and associates are naturally friendly and energetic with residents, families, friends, and other visitors to the community. *Flourishing at Brightview* encourages them all to take extra welcoming steps for new residents.

For example, in the evening of a new resident's first day, the Concierge calls the resident to inquire if anything is needed and brings tea and cookies to the resident's apartment home. In the weeks following move-in, directors and associates are attentive to a new resident's acclimation. All of the directors make a point of checking in with new residents to build relationships and customize their experience. A Maintenance Director will stop by to see if curtains or pictures need to be hung. The Dining Services Director will make inquiries on favorite meals and recipes. And, Vibrant Living Directors are discovering resident's interests and talents so the new residents can take full advantage of programming and potentially initiate new ones.

They are continually looking for opportunities to create memorable moments, or "Wow" moments, so new residents feel at home in their new community.

Communication is another key component of *Flourishing at Brightview*. To answer questions and address concerns, the Executive Director follows up with new residents within 48 hours of move-in.

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We shared this news with all of the affected associates as soon as we made the decision, a year and a half ahead of when the transaction was expected to be completed.

While we knew this put us at risk of losing some of these associates, who we needed until the sale was complete, we simply felt that it was the right thing to do.

We are so proud that morale has remained very high, we've retained over 99% of all of these associates and, in fact, they are some of the people who responded to the Baltimore Sun survey naming us a top workplace!

We create beautiful communities but our culture and service are lived out every day by the amazing people who work at The Shelter Group and Brightview Senior Living.



Brightview Canton, in Canton, Massachusetts, is one of three Brightview communities that opened this fall. Brightview Warren, in Warren, New Jersey, and Brightview Paramus, in Paramus, New Jersey also opened.

## CHALLENGES PRESENTED; CHALLENGES OVERCOME

Shelter Development has successfully focused on creating quality communities to meet market-place needs for over 35 years.

The team of developers takes the time to understand individual markets and builds relationships with neighborhoods, governments, businesses, and financial partners.

Brightview Senior Living opened its first community in 1999 and offers thirty-five communities in eight states. A leader in the industry, the senior living company continues to grow. Three communities opened over the past few months: Brightview Canton in Canton, Massachusetts; Brightview Warren in Warren, New Jersey; and Brightview Paramus in Paramus, New Jersey.

Insights sat down with David Holland, Vice President of Shelter Development, Executive Director at Brightview Paramus Stephen Nichols, and Denise Manifold, Regional Vice President of Sales, to learn more about the "development to opening" process, some of the challenges the teams face, and how the challenges are overcome.

### HERE IS AN EXCERPT OF OUR CONVERSATION:

#### DAVID HOLLAND, VICE PRESIDENT OF SHELTER DEVELOPMENT

**SS:** When you are looking to develop communities, what are some of the challenges you face as a developer?

**DH:** As you can imagine, there are plenty of challenges during the entire spectrum of the process.

We prefer to develop our communities in mature, affluent, and densely developed areas. We do this because these areas have significant demand for our services often with few providers because of the barriers to entry. As a result, it is very difficult to find land to develop.

If we are fortunate to locate land that is desirable, it is then often a challenge to convince the land owner to sell or if interested, at a feasible sales price.

**SS:** Once you get a parcel of land under contract, what are some additional obstacles?

**DH:** Once we identify a desirable location, neighbors often fight our request to build our communities because they fear change and uncertainty. Building positive relationships and convincing neighbors we can make a positive impact on their communities is something on which we focus a great deal of effort. We always endeavor to be a good neighbor in any community where we develop.

Getting zoning approvals to allow us to start construction are difficult to obtain as well because it often requires us to ask for variances to a municipality's zoning ordinance which they are reluctant to grant.

Finally, rising construction costs in an improving economy like we have today make it a challenge to keep a project on

budget to allow us to achieve reasonable returns for our investors.

**SS:** Three communities have opened in the last several months. Can you speak specifically about any challenges you faced?

**DH:** Well, for Brightview Warren, which opened to residents on October 12, the zoning board members did not want to amend their township ordinances for us to build on the 16 acres we acquired. In this case, we actually had the support of neighbors, township staff, and consultants, but the planning board did not want us to build a community large enough to include an independent living component, like Brightview Perry Hall or Brightview Severna Park.

It was certainly frustrating but, with the dedication of our entire team including operations, designers, and engineers, we were able to adapt our program to meet the planning board's requirements while delivering a fantastic community. Brightview Warren has been extremely well received: before the community opened, it was 50% pre-leased.

For Brightview Paramus, we had to manage some family dynamics that resulted in lengthy land contract negotiations. In the end, we gained their confidence that we could help navigate the process.

We built a level of trust and credibility with them. That positive relationship allowed us to explore and eventually develop adjacent land the family owned to expand our community by 30 more apartments. This paid immediate dividends as we had 140 of the 170 apartments pre-leased prior to opening the community in November.

**SS:** What are some of the ways you overcome these challenges?

**DH:** Communication and transparency—beginning very early and throughout the process, and with all stakeholders—is vitally important.

We try to meet with neighbors and civic groups early and often in an effort to build a cooperative relationship. We also work to build trust; that we will be good long term neighbors.

The same can be said of building relationships with local politicians and zoning board members to show them we are responsible developers and will be good corporate citizens.

From a development perspective, we also try to discover as many of the potential development issues that might arise for our project early in the process so that we design an effective roadmap for getting through the entitlement process and design a program that will be able to meet the needs of our residents while being compatible with the site and the neighborhood and meeting all of our design and construction requirements.

**SS:** What do you find rewarding about the process?

**DH:** While we cite all of these challenges, I would say what we do in development is extremely rewarding. It's gratifying to see what often starts with nothing more than a vision develop into these wonderful, vibrant Brightview communities teeming with activity.

We are creating homes for seniors that allow them to stay in the communities in which they worked and raise their families. I, for one, am thankful to be a part of what Brightview brings to so many others.

### STEPHEN NICHOLS, EXECUTIVE DIRECTOR OF BRIGHTVIEW PARAMUS

**SS:** Within 5 days of opening, your community already had 87 residents. That's extraordinary. How is everything going?

**SN:** It has been amazing...but a blur—as though we were entering the earth's atmosphere. Opening day was our goal, and we were ready. But as we got closer, we started to shake, thought we'd burn up a couple of times, but we've leveled off.

It was all hands on deck for an extremely busy first week for us all—from front line associates to department heads to my Associate Executive Director, Samantha Lawrence, and myself. We also had great support from so many others—from other Brightview communities and the Home Office. But here we are. Now we are in a groove. It doesn't seem possible that we opened less than 2 weeks ago.

Best of all, the residents are thrilled—excited and happy to be in their new home. That is truly what it is all about.

**SS:** Because you had such strong leasing success before the community opened, what were some of your challenges of hiring and training all of your staff?

**SN:** Logistics was probably the biggest challenge. Finding a location where we could have multiple group interviews going on at once, and ensuring that they were effective and not too loud, was the hardest thing to plan and execute.

We were so busy in the Welcome Center and could not get into the community during construction so we held group interview sessions off-site at a local hotel. In the end, we had three different two-day sessions of group interviews. We interviewed nearly 500 people, a staggering number.

As for training, that was nothing short of a Herculean undertaking.

One week prior to opening, the team from Brightview University came in and ensured all of our associates received their training. We split it into two concurrently running sessions for a total of 80 associates. It was so well-organized, even lunch times and dedicated bathroom breaks were varied.

**SS:** You've seen Brightview Paramus at the very beginning—in development—to opening. What has been your favorite part?

**SN:** Narrowing it down to one thing is hard as this has been one of the most exciting work experiences of my life.

As construction neared completion, I enjoyed walking the building every day, getting to know the construction workers. I also enjoyed hiring an entire staff soup to nuts, working with 140+ depositors and their families, marketing a company brand new to the marketplace, networking, working with 10 department heads, and more...it was like a tornado.

But being calm, pulling it all together, and watching the community take shape and open has been the most fun I have ever had.

Best of all, was a recent conversation with one of our earliest depositors.

He grabbed my shoulder and thanked me. He said it was a long wait but feels it was all worth it. He and his wife love the community. He said he saw how hard everyone was working to ensure residents' happiness and wanted to let me know how much it was appreciated.

To see a smile on his face and to hear his gratitude makes it all worth it. He is happy. Our residents are happy. That is why we wake up and do the jobs we do.

### DENISE MANIFOLD, REGIONAL VICE PRESIDENT OF SALES

**SS:** Denise, you've been involved in a number of community openings now. What are some of the steps when launching a Welcome Center to introduce a community?

**DM:** Forming our initial team, which typically consists of our Executive Director (ED), Community Sales Directors (CSDs) and Business Office Manager (BOM), is the first step. Melissa August, Senior Talent Acquisition Specialist, has been instrumental in helping us hire strong teams that do a tremendous amount of work in order to ensure a successful opening.

Once this initial group is on board we have to work quickly to get them trained and ready to talk with families and referral sources about our community, painting a picture of what life will be like at Brightview. We call this selling 'blue sky'. This can be a challenge as we're trying to get prospects and referral sources to visualize and believe in something that doesn't even exist yet.

**SS:** What are some of the ways you sell 'blue sky'?

**DM:** We have a number of tactics that we utilize to help the greater community understand who we are, what we do, and why we're different. I'll talk about three that really stand out.

We host a series of events throughout our presales efforts, often starting with our Get to Know luncheons. These events are typically very popular and give prospective residents a chance to learn about the history of Brightview Senior Living, which helps build credibility, and how our new community could change their lives for the better.

During these events we focus on the lifestyle offered at Brightview and discuss how that lifestyle has benefited residents living in other Brightview communities.

Second, we spend a great deal of time reaching out to the professional community, including local businesses, to educate them on our new community and discuss partnership opportunities. As we build these relationships and talk with this group about life at Brightview, they begin to see that we are building a special community.

Finally, when visiting with prospects and their families, some ask to see another Brightview community so we'll take trips to some of our local sister communities.

The fact that these communities are so willing to offer support and roll out the red carpet during our visits is always very much appreciated and can have a significant impact on a prospect's decision.

**SS:** And what is your favorite part about opening a community?

**DM:** There are several things that I love about opening a new community. I really enjoy seeing a new team come together, watching the excitement on new resident's faces as they see the community for the first time, and hearing from referral sources in the market that we've created something special. It is a great feeling.



Bright yellow, blue, red, and silver confetti sparked as it flew through the air when first depositor, Eileen, walked through the front door of newly opened Brightview Warren.

## Shelter Properties Receives Spirit of Caring Award and Bronze for Property Management Company of the Year; Associate Nicole Howard Wins Super Star of the Year; Many Communities Recognized at 20th Annual Star Awards Celebration

In fall 2016, management companies from across Maryland gathered in Baltimore for Maryland Multi-Housing Association's (MMHA) 20th annual Star Awards.

Designed to honor members of the Association who exhibit the most outstanding communities and professionals in the multi-housing industry, MMHA Star Awards are awarded based on comprehensive and competitive scoring from community inspections and associate interviews. MMHA's Star Certifications and highly coveted gold, silver or bronze recognition are prestigious honors for the management companies, communities and associates.

A record number of entries were received in 2016.

For 2016, Shelter Properties was the winner of the coveted Spirit of Caring Award, an award

given to one property management team each year.

In addition, Shelter Properties was awarded bronze for Property Management Company of the Year.

Park View at Laurel I, Park View at Laurel II, Park View at Ellicott City II, and Overlook at Monarch Mills were all acknowledged as Star Certified. Park View at Ellicott City I placed bronze in the Active Adult category and Park View at Randallstown placed silver. And, Ashland Commons placed silver in the Workforce Housing category.

Moreover, Shelter Properties associate Sheppard Uhl received silver for Porter of the Year and Assistant Property Manager of Ashland Commons and Park View at Ashland Terrace Nicole Howard won the Super Star of the Year award, an award given annually to one individual.



"We are thrilled for all of the teams who were honored as well as those teams that supported them," affirmed Diane Edwards, Senior Vice President of Operations. "We are so proud of the tremendous jobs our teams do each and every day."

## End of Watch



On February 10, 2016, two Harford County police officers, Deputy Patrick Dailey and Senior Deputy Mark Logsdon, lost their lives in a police shooting in Abingdon, Maryland.

Sadly, the events culminated in the parking lot of Park View at Box Hill.

A tribute to honor the fallen heroes was held earlier this year at the community with the dedication and installation of an engraved garden bench.

Local public officials, the Harford County Sherriff and members of the Sherriff's department, associates from The Shelter Group, Park View at Box Hill residents, and families of the fallen heroes attended the special ceremony.

"We felt it was appropriate to honor their memories and recognize the connection of Park View at Box Hill to them and the ultimate sacrifices they made to serve and protect the community," explained Jeff.

Prior to the unveiling of the bench, Jeff Hettleman, Executive Vice President of The Shelter Group, Jen Logsdon, wife of Senior Deputy Logsdon, and Harford County Sherriff Jeffrey Gahler spoke on the heroic actions of the officers.

Engraved with the names of the officers and the phrase, "End of Watch, February 10, 2016" the bench serves as a memorial and a place of reflection. Deputy Logsdon's wife has also created a memorial garden in honor of her husband.

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For new residents in Assisted Living and Wellspring Village, Executive Directors also reach out to family members. New resident progress and challenges are addressed at daily stand-up meetings and all associates are encouraged to share their observations so concerns can be addressed promptly.

In addition, Resident Ambassadors volunteer to show new residents around the community, invite them to dinner, and introduce them to others. The residents themselves are the best way to integrate newcomers to their new community since they have gone through the transition themselves.

The guide for *Flourishing at Brightview* is comprehensive with these ideas and more.

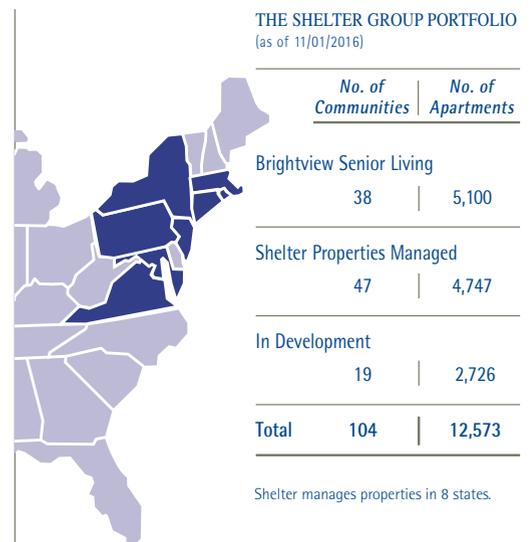
In addition, a checklist, tracking tool, and list of



tools to assist in the new resident's orientation to the community are part of the manual.

At the end of the first 60-90 days, new residents are asked for their feedback with five survey questions to evaluate the orientation process and how their experience could be improved.

"It is a total team effort," says Martha McClung, Director of Vibrant Living. "The orientation process for new residents just keeps getting better and better."





## Kristian Spannhake Wins Leadership Award from Urban Land Institute

Kristian Spannhake, Project Director with Shelter Development, was awarded the Urban Land Institute's (ULI) Baltimore Distinguished Leader Award.

Presented to an individual who exemplifies excellence in leadership and is a contributing member of ULI Baltimore during the year, the ULI Baltimore Distinguished Leader recognition was presented at the organization's 8th annual Wavemaker Awards gala in early October.

Kristian recently completed Brightview Tarrytown, Brightview Woodburn, and The Reserve at Somerset Commons. Upcoming projects include Brightview Wakefield, Brightview Crofton, an expansion of Brightview Severna Park, Brightview Bethesda, and Brightview Grosvenor.

Kristian has been an active member of ULI for over 5 years, serves on the WaveMaker Committee, and has been involved with the Young Leaders Committee where he most recently served as Chair.

## Associates Gain Financial Peace of Mind with New Campaign

According to the American Psychological Association, the primary cause for employee stress is finances.

Moreover, national data indicates seventy-six percent of Americans live paycheck to paycheck, about 60% of workers report saving less than \$25,000 in their overall retirement savings accounts, and almost half of employees don't have retirement savings.

In response to these statistics and in a continued effort to support associate well-being, The Shelter Group and Brightview Senior Living launched a new wellness campaign focused on financial wellness called *My Secure Advantage*.

With *My Secure Advantage*, associates can work with a Money Coach for up to 90 days, access monthly financial education webinars, and track their finances in one place with MSA Wallet, a personal finance management software.

Best of all, Money Coaches have no products to sell and are solely focused on education and teaching new money habits through one-on-one confidential and unbiased coaching relationships.

Those who work with a Money Coach report saving an average of \$250 per month, de-



creased financial stress, and a 65% improvement in financial wellness.

Coaching is customized to fit each associate's individual lifestyle and financial needs, and covers topics such as debt, credit, spending, mortgage, student loans, divorce, bankruptcy, identify theft, taxes, retirement, and investing.

In addition to all the benefits of *My Secure Advantage*, associates who complete at least three consults with a Money Coach have the opportunity to win one of 15 raffles for a \$200 paycheck bonus—a great opportunity to boost funding to a savings or retirement account.

Money Coaches can be reached at 888-724-2326 or [mysecureadvantage.com](http://mysecureadvantage.com).

This free and confidential benefit is available to all associates through January 22, 2017.

## Brightview Great Falls Partners with Madeira School for Off-Campus Service Internships

Brightview Great Falls, one of three Brightview Senior Living communities in Virginia, is partnering with The Madeira School, an all-girls day and boarding school in McLean, Virginia.

Volunteers from the tenth grade experienced a variety of roles and job responsibilities at the community during the fall semester in what is known at Madeira as *Sophomore Co-Curriculum*.

The off-campus internship experience connects students to their local community and to the concepts of social responsibility and civic engagement.

"A pillar of Madeira's founding was the notion of Service," said Kerin Hamel, Director of Co-Curriculum. "We find that students

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acquire valuable knowledge about and empathy for underserved populations/ issues when immersed in that social situation. As a device for learning, it is of the utmost importance. Young women in particular have innate empathy that makes them good stewards of the community."

"The benefit of having partners such as Brightview is that they help supplement the natural willingness with context [and] real-life experiences for understanding and growth."

In groups of 5 to 14, the students volunteer at area schools, various non-profits, and local government organizations. The Co-Curriculum Fall semester ran each day from October 11 –



November 10. Co-Curriculum is also held in the Spring semester.

Other sites for Co-Curriculum include Special Olympics, Garfield Elementary School, The Kilmer Center, Calleva Farms, NOVA Family Service (a Head Start Center) and Claude More Colonial Farm.



### CRISTO REY STUDENT INTERNS

Student interns from Cristo Rey Jesuit High School are back to work at The Shelter Group for the 9th year.

*Pictured from left to right, 1st row: Kamal Williams and Riccy Amador; 2nd row: Ken'Niya Baltimore and Zack Wiley*

### Home Office

**Desiree Wingo**  
Claims Risk Management Specialist  
to Manager of Risk Management  
and Safety

**Jessica Green**  
Benefits Administrator to  
Human Resources Administrator

**Julia Marrocco**  
Assistant Controller to Controller

**Kristie Baker**  
Corporate Payroll Benefits Accountant  
to Accounts Payable Manager

**Rebekah Schneider**  
Senior Accountant to  
Assistant Controller

### Shelter Properties

**Joseph Artis**  
Park View at Coldspring  
Maintenance Technician to  
Maintenance Supervisor

**Patricia Moats**  
Park View at Severna Park  
Property Manager to  
Senior Property Manager

**Princess Robinson**  
Park View at Bladensburg  
Property Manager to  
Senior Property Manager

**Shaquanda Prattis**  
Park View at Easton  
Assistant Property Manager to  
Property Manager

### Brightview Senior Living

**Ann Anderson**  
Brightview Falls Grove  
Vibrant Living Assistant to  
Vibrant Living Director

**Ansley Santos**  
Brightview Randolph  
Resident Assistant to  
Senior Resident Assistant

**Ashley Baker**  
Brightview Towson  
Cook to Chef

**Brenna Nave**  
Brightview Westminster Ridge  
Resident Assistant to Wellness Nurse

**Briseyda Cervantes Montes**  
Brightview Rolling Hills  
Dining Server to Senior Dining Server

**Cassandra Shields**  
Brightview Greentree  
Dining Server to Senior Dining Server

**Cheryl Graham**  
Brightview Concord River  
Senior Concierge to  
Business Officer Manager

**Donald Michel**  
Brightview Arlington  
Wellness Nurse to  
Assisted Living Manager

**Elena Wilson**  
Brightview East Norriton  
Vibrant Living Assistant to  
Vibrant Living Director

**James Coleman**  
Brightview Perry Hall  
Executive Chef at Brightview Bel Air  
to Executive Chef at Brightview  
Perry Hall

**Jeffrey Shearer**  
Brightview East Norriton  
Housekeeper to  
Housekeeping Supervisor

**Jennifer Turner**  
Brightview Country Club Heights  
Wellness Nurse to  
Wellspring Village Director

**Jessica Hill**  
Brightview White Marsh  
Wellness Nurse to  
Assisted Living Manager

**Joshua Breedon**  
Brightview North Andover  
Senior Resident Assistant to  
Assisted Living Manager

**Kathleen Fusco**  
Brightview Danvers  
Vibrant Living Assistant to  
Senior Concierge

**Kellie McHugh**  
Brightview North Andover  
Associate Executive Director to  
Executive Director

**Kerri Glover**  
Brightview Bel Air  
Cook to Chef

**Kristen Hernandez**  
Brightview Tarrytown  
Dining Server to Housekeeper

**Ma Rose Decena**  
Brightview Great Falls  
Residents Assistant to  
Wellness Nurse

**Mae Resurreccion**  
Brightview Canton  
Housekeeper to Senior Housekeeper

**Maeve McNamara**  
Brightview Arlington  
Dining Server to Senior Dining Server

**Marie Rogers**  
Brightview Arlington  
Resident Assistant to  
Senior Resident Assistant

**Marissa Zdep**  
Brightview Greentree  
Dining Server to Senior Dining Server

**Mary Madonna-Simmerman**  
Brightview Woodbury Lake  
Concierge to Senior Concierge

## PROMOTIONS

**Memuna Lamin**  
Brightview Falls Grove  
Resident Assistant to  
Senior Resident Assistant

**Michaela Byron**  
Brightview Commons  
Dining Server to Senior Dining Server

**Natasha Wilson**  
Brightview Severna Park  
Concierge to Senior Concierge

**Patricia Ediamen**  
Brightview North Andover  
Resident Assistant to  
Senior Resident Assistant

**Sajeirys Veras**  
Brightview North Andover  
Resident Assistant to  
Wellness Nurse

**Shannon Thierry**  
Brightview Tenafly  
Community Sales Associate to  
Community Sales Director

**Thea Perry**  
Brightview Greentree  
Dining Server to Senior Dining Server

**Tina Aulakh**  
Brightview West End  
Executive Director at Brightview  
Great Falls to Executive Director at  
Brightview West End

**Traci Simpson**  
Brightview North Andover  
Wellspring Village Director to  
Health Services Director

**Vicente Guerra Blanco**  
Brightview New Canaan  
Cook to Chef

**Yahira Pena**  
Brightview Mt. Laurel  
Concierge to Senior Concierge