

## In this ISSUE...

With the start of summer, we are really pleased to have completed the fundraising and closing of our seventh equity fund, Brightview Senior Living VII, which will provide the equity for our planned growth over the next four to five years.

We are gratified by the fact that virtually all of our existing investors in our previous funds chose to continue to invest with us in this new fund. We also have a good number of new investors who were attracted to the measured approach to growth we have taken, with getting to a certain scale never being our goal. Rather, we want to grow in a predictable and planned way so we can assure that all of our communities—existing and new—have the resources, tools and people they need to provide great service to our residents. Although we raised more than our target for the fund, we will not speed up our pace of growth. Instead, it will extend the time before we will raise the next fund.

In this issue, you'll read about our exciting new initiatives in digital marketing, led by Vice President of Sales and Marketing, Julie Masiello. What I've really appreciated about these new approaches to marketing our Brightview communities and the vibrant lifestyle our residents experience is that the impact of each ad we buy can be tracked and evaluated as to whether it resulted in new leads and new residents, so we are also able to use our

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Marilynn Duker  
President, The Shelter Group



SPOTLIGHT

## YET ANOTHER REASON TO "Like" Brightview

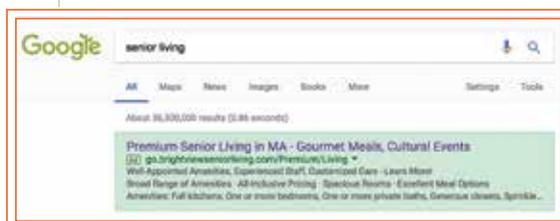
To reach more prospects and adult children and to complement traditional offline advertising, Brightview Senior Living launched several new digital marketing initiatives this year.

**WHY DIGITAL?** In recent years, consumers have radically changed the way they shop. Of adults who use the internet, 92% search on sites like Google to research information before deciding to make a purchase. Even in the 65+ crowd, 87% use these search engines to learn about options.

### PAY-PER-CLICK ADVERTISING

To stand out from other senior living providers on the internet, Brightview has begun a Pay-Per-Click (PPC) campaign, putting a Brightview ad at the top of the page when someone searches common terms such as "assisted living" or "dementia care."

If the prospect clicks on the ad, they go to a special web page to learn more about Brightview. The prospect then completes an online form indicating the community they are interested in exploring, and an alert shows up on the Community Sales Director's (CSD) phone. The CSD can then contact the prospect right away.



As the name implies, this marketing is "Pay-Per-Click," so if you decide to do a search to see our ads, please don't click on the ad yourself, or we will pay for your click!

### SOCIAL MEDIA – FACEBOOK

Brightview has also started using social media to show off the vibrancy of Brightview's communities. The largest-growing group on Facebook is adults ages 65 and older—in 2016, 62% of seniors were liking and sharing on Facebook, up from 48% just the year before.

Photos of happy, engaged residents, posted each week by Vibrant Living Directors, are the best way to demonstrate Brightview's vibrancy to prospective residents and families. Facebook is also a fantastic method of keeping current families in touch with community events and news. Communities have posted so many "feel good" messages, including centenarian birthday celebrations, awards, and community volunteerism. Daily posts are also made to Brightview's Company page.

The business impact of these posts have been impressive: more than 15,000 people clicked, liked, shared, or commented on the main Brightview Facebook page just in the month of May. That's a lot of brand awareness!

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summer

marketing dollars wisely, in ways that are most effective. It's also fun to see the great stories and photos on our Facebook pages—for those of you who can't routinely get out to visit a community, this is a great way to connect with what all of our efforts are actually helping to create!

I couldn't be more thrilled about my partner, Jeff Hettleman, becoming our Chief Financial Officer. I've had the great pleasure of working with Jeff for 23 years now and know the passion he has for what we do and how much he genuinely cares about people. He has made many significant contributions to the success of our companies over the last several decades and I know he will be a terrific and strategic leader for our finance and accounting teams.

I've written before about our planned sale of our affordable housing portfolio, a decision we made 18 months ago in order to focus all of our attention on our senior living business.

A very complex transaction, this sale will finally be consummated this summer.

We could not be prouder of the extraordinary associates in Shelter Properties. Although they've known about this sale for the last 18 months, they have not had one misstep, instead maintaining very high morale, terrific performance, and very little turnover.

On a personal note, when this sale occurs, my greatest loss will be the fact that I will no longer be working with Di Edwards, our Senior Vice President of Operations for Shelter Properties. She is truly one of the most exceptional people and leaders I have ever had the honor of working with in my 35 years here. She sets the bar high and inspires people to rise to do their absolute best.

Knowing Di as my friend and my colleague for the last ten years is one of the highlights of my career. We have been incredibly fortunate to have her as the leader for this part of our business.

The Marketing team—comprised of Anita Rasmussen, Marketing Project Manager, Mike Thompson, Digital Marketing Manager, Pamela Schindler, Marketing and Design Manager, and Sarah Schlenker, Copywriter, and led by Julie Masiello, Vice President of Sales and Marketing—has also had great success using Facebook as a supplement to direct mail when advertising community marketing events. Many people see these ads on their Facebook feeds, and share them with their friends. It's a nice "viral" way of spreading the word about our events.

Now that the digital ball is rolling, stay tuned for more exciting changes in 2017, including a redesign of Brightview's website: [www.brightview seniorliving.com](http://www.brightview seniorliving.com). Improved navigation, more photos and videos, and enhanced content are just a few of the expected improvements on the new website.

While you're online, have a look at Brightview's new YouTube page, where we are using video to further bring the vibrancy of our communities to life. And finally, keep an eye out for a new testimonial/review program, where Brightview fans will be encouraged to share their feedback and opinions about Brightview online.

Brightview Senior Living added 4 new photos.  
May 17 at 9:06am · 0

Brightview Rolling Hills, in Catonsville, Maryland, knows how to do breakfast in a really big way. Biscuits and Jam, French Toast and French Horns, and Pancos and Pancakes are just a few of their festive, monthly breakfasts which features performances by resident musicians.

"We have a lot of fun with these," shares Shirl Younger, Vibrant Living Director. "It is such a treat to hear our talented residents play. And the food is always delicious." ... See More

Brightview Senior Living (Staunton, VA)  
February 25 · 0 · 0

After the Valentine's Ball, dining service associates Burt and Danielle let loose and made cleaning up and resetting the dining room a little more fun with "Can't Stop the Feeling" by Justin Timberlake.

If you haven't already, go to [facebook.com/BrightviewSeniorLiving](http://facebook.com/BrightviewSeniorLiving) to get your daily dose of awesomeness. To check out each community's Facebook page, search for the community name in the Facebook search bar, and make sure you "like" those pages.



## BRIGHTVIEW SENIOR LIVING 2017 LEADERSHIP CONFERENCE

*Brightview Senior Living's associates are nothing if not determined.*

Once again, Mother Nature did not cooperate on the annual leadership conference dates. Significant snow fall impacted the East Coast and travel from Boston to Baltimore.

After managing the snow at their communities, Brightview Directors adjusted travel plans and arrived at the Gaylord National Harbor in Oxen Hill, Maryland ready to tackle a condensed schedule.

*Creating a Bountiful Garden* was the 2017 conference theme, and focused on Brightview's most valuable asset, its people.

The conference objectives included:

- Reinforce Brightview Directors' role in attracting, retaining, coaching, motivating, and leading a high performance service delivery team, which is included in their job description
- Capitalize on the tools and resources available to build an engaged team
- Create a proactive community strategy

David Greydanus, Brightview's Executive Vice President and Chief Operating Officer, kicked off the conference theme as the father of our country, George Washington.

During his opening address, he shared his tactics for training dedicated troops and his love for his home. Andrea Griesmar followed with compelling statistics on the time spent interviewing, onboarding, and training associates and the risks of not selecting the right person.

The garden metaphor and conference agenda included *Planting with Purpose*: how to maximize the existing tools for interviewing and hiring the right associates; *Nurturing New Growth*: an exchange of best onboarding practice during a new associate's first ninety days; and *Tending the Garden*: a facilitated exercise to identify how managers can best motivate and engage their teams.

Later that evening, Brightview's annual Awards Gala was held on a boat that cruised the Potomac River. Brian Engle, Senior Vice President of Operations, hosted the event that recognized associates and communities for their heartwarming ability to create vibrant communities of possibility, independence and choice as well as meet operational goals.

**Brightview Severna Park won the coveted Community of the Year award.**

The conference wrapped up with insights from associate focus groups that were conducted last fall and the company's commitment to continually make Brightview an employer of choice by addressing some of the issues that were raised.

Comedian David Glickman provided an excellent summary of the entire conference with a big dose of humor. Attendees left with broad smiles and a renewed commitment to build and motivate high performing teams.



## Brightview Warren and Brightview Paramus Celebrate Grand Openings

With residents, families, friends, associates, and special guests, two of Brightview's newest communities celebrated their official openings this spring.

"This was an extraordinary way to mark the official opening of Brightview Warren," exclaimed the community's Executive Director Susan Bruncati about their event. "And a great way to honor our first residents and their families. We were also able to thank everyone who played a part in bringing the community to life."

"We are thrilled to mark this important day," announced Stephen Nichols, Executive Director of Brightview Paramus about their celebration.

"Honoring our first residents and their families—which now number over 180—was a terrific way to kick-off the event. We also thanked those who were involved in developing and building this fabulous community. It is really one-of-a-kind, and we are so excited to bring everyone together to mark this special occasion."

Beth Kroncke, the daughter of Eileen Perley, one of the first residents of Brightview Warren, captivated attendees when she talked about her mother's wonderful experiences in just a few short months at the community. Her mother, dubbed 'the mayor' of the community, is delighted to call Brightview Warren home. She has a number of opportunities to socialize and try new things. Moreover, Beth complimented the energetic team of associates and emphasized how grateful she was to have her mother living at Brightview Warren.

At Brightview Paramus, one of the community's first residents, Norman LaPoff, spoke about his and his late wife's transition to the community. He was grateful for the care and support in Assisted Living, and was very encouraging to people who were hesitant about "making the change to a senior living community."

Brightview Warren first opened to residents on October 12, 2016. The community is located at 57 Mt. Bethel Road in Warren, New Jersey and features Assisted Living and Wellspring Village®, Brightview's innovative neighborhood and program for people living with dementia. The community also includes a unique approach to Assisted Living with its Gallery Program. Features include the finest and most spacious apartment homes, patios and private entrances, full kitchens, washers and dryers, and personal butler service.

Located at 396 Forest Avenue in Paramus, New Jersey, Brightview Paramus features Independent Living, Assisted Living, and Wellspring Village. Brightview Paramus first opened to residents on November 14, 2016.



## JEFFREY K. HETTLEMAN NAMED CHIEF FINANCIAL OFFICER OF THE SHELTER GROUP / BRIGHTVIEW SENIOR LIVING

*"I am delighted to be working with this dedicated and passionate group in this new capacity," says Mr. Hettleman. "We have carefully planned for Brightview's growth over time so assuming this new role is a terrific opportunity."*

Congratulations to Jeff Hettleman, Executive Vice President and Partner at The Shelter Group. He has been named Chief Financial Officer at The Shelter Group and Brightview Senior Living.

"Creating senior living communities that exceed expectations guides us in our work each day," explains Marilynn Duker, President of The Shelter Group. "And, we have successfully created great places to live and great places to work."

"During Jeff's 23-year tenure, he has been known for his integrity, keen mind, genuine warmth, interest in other people, and generous spirit. His track record with incredibly complex assignments and problems is exceptional. Moreover, he fully embraces our culture and will bring strong leadership to this key role."

"Jeff is a wonderful partner and friend," added Marilynn. "We are very excited for him."

As Chief Financial Officer, Mr. Hettleman will be responsible for Shelter's financial planning and analysis, banking relationships, tax planning and overall investor relations. In addition, he will lead Shelter's finance and accounting teams.

Mr. Hettleman is deeply involved in the community and serves on the Mayor of Baltimore's Workgroup on Homelessness. He is also a past-President and current member of the Boards of Directors of AFYA Baltimore Inc. (which runs the AFYA, Tunbridge and Brehms Lane charter schools in Baltimore City) and the Maryland Affordable Housing Coalition.

Prior to joining Shelter in 1994, Mr. Hettleman was an attorney at the law firm of Piper and Marbury in Baltimore where he specialized in structuring and closing real estate and corporate transactions.

Mr. Hettleman holds a B.A. in Political Science from Haverford College and a J.D. from the Yale Law School.



THE SHELTER GROUP PORTFOLIO  
(as of 07/01/2017)

	No. of Communities	No. of Apartments
Brightview Senior Living	38	4,917
Shelter Properties Managed	45	4,442
In Development	19	2,726
<b>Total</b>	<b>102</b>	<b>12,085</b>

Shelter manages properties in 8 states.

## Bladensburg Commons Opens with Building Dedication

Bladensburg Commons, a 100 unit mixed-income, workforce housing community in Bladensburg, Maryland, celebrated its grand opening with a building dedication in mid-May.

The dedication officially opened the building, welcomed residents, and thanked key stakeholders for their involvement in the development and building processes.

"We are thrilled to open this important housing resource for families in the Town of Bladensburg and Prince George's County," explained Jeff Hettleman, Chief Financial Officer and Partner at The Shelter Group. "We are so grateful for the hard work and dedication of so many who came together to bring this community to life."

"It is this teamwork and commitment to excellence that makes these communities wonderful places to live and work."

In collaboration with The Shelter Group and co-developer and resident services partner Housing Initiative Partnership, Inc. (HIP), Mark, Thomas Architects, Ben Dyer Associates, Inc. and Hamel Builders, Inc. teamed up to design and construct Bladensburg Commons. The community is managed by Shelter Properties.

The United States Department of Housing and Urban Development (HUD), AGM Financial Services, Inc. and Wells Fargo Bank, the Maryland Department of Housing and Community Development, Prince George's County Department of Housing and

Community Development, Boston Capital Corporation, and SunTrust Bank provided the necessary financing for the project.

Located at 4200 58th Avenue in Bladensburg, Maryland, Bladensburg Commons is 61% leased.

The community opened to residents on February 28, 2017 and boasts the following amenities: controlled access entry, computer and business center, fitness center, lending library, billiards room, playground, and easy access to the Metro.



# HAPPENINGS



## ANNUAL SHELTER PROPERTIES AWARDS EVENT GOES ON THE ROAD

This year, Shelter Properties held their annual Awards Celebration during a well-orchestrated, company-wide conference call.

Dubbed *Shelter Properties' Awards Presentation Road Show*, Home Office associates dispersed to communities to present each of the awards in person. Stories and speeches were shared on a call at a designated time.

The format may have differed from previous years but the award criteria remained the same: awards were given to those associates and teams who exemplify Shelter's STARS core values of Service, Teamwork, Action, Reputation, and Success. Excellence in Compliance, Operations, Wellness, and Resident Services were also recognized.

Community of the Year was awarded to Cambridge Commons.

"This was a remarkable event! We realize this was a huge departure from our annual awards event, but the positive energy, enthusiasm, and support from all of our team members exceeded our wildest expectations.

Once again, Shelter Properties had an extraordinary year. We have an amazing team of associates who have come together and focused on a common goal. I am so proud to work with each and every member of this tremendous group. My life is truly enriched as a result."

— Diane Edwards  
Senior Vice President of Operations  
Shelter Properties



## ON THE MOVE

### MOVE MORE, SIT LESS, AND THRIVE!

That's the motto of *ON THE MOVE*, a 12-week wellness challenge offered through WELCOA (Wellness Council of America) designed to provide motivation and exercise guidance from best-selling author and internationally renowned health and fitness expert, Coach Sean Foy.

For the second year in a row, more than 400 Shelter and Brightview associates joined this national challenge and earned points for physical activity as well as for completing simple activities on the challenge platform. Challenge activities included watching exercise videos, reading short articles, sharing weekly goals, and taking insightful quizzes. Based on their points, associates were entered into weekly prize raffles for \$30 Amazon gift cards to use on a gift to inspire their health and fitness journey.

This year, there was a strong focus on creating a support system of friends and family members and learning how to inspire each other to achieve a healthier and more active lifestyle. One strategy was to **DREAM** with others: **D**escribe your dream; **R**efine your dream; **E**xperiment with different activities; **A**lways have fun; and **M**eet with mentors and coaches.

Along the way, associates shared great stories of their success. WELCOA reported that, nationally, 9 out of 10 participants increased their physical activity enough to see weight loss and health improvements!

**A BRIGHTVIEW COUNTRY CLUB HEIGHTS ASSOCIATE SHARED, "I REALIZED HOW OFTEN I DON'T MOVE. THIS CHALLENGE WAS GREAT MOTIVATION TO GET MOVING!"**

A Wellspring Village associate at another community shared, "A former job had me spending WAY too much time being sedentary. I gained weight and became totally out of shape. I quit that job but struggled to find the motivation to get back in shape. The ON THE MOVE challenge gave me the motivation I needed. I have hit 10,000 steps every day and have exercised at least 30 minutes every day and now my obsession with not breaking my streak is keeping me going! I am losing weight, but even more importantly, I am feeling more energetic and happy!"



# PROMOTIONS

## Home Office

**Andrew Crummey**  
Assistant Project Manager to  
Project Director

**Karl Douglas**  
Wellspring Village Director at Brightview  
Perry Hall to Executive Director in Training

**Lynnea Pinder**  
Human Resources Administrator to  
Payroll Administrator

**Theodore Wies**  
Project Director to Senior Project Director

## Shelter Properties

**Henri Nseke Ekwa**  
Bladensburg Commons  
Maintenance Technician to  
Maintenance Supervisor

**Patricia Moats**  
College Parkway Place  
Senior Property Manager to  
Area Property Manager of College  
Parkway Place, Park View at Furnace  
Branch and Park View at Severna Park

## Brightview Senior Living

**Andrew Pena**  
Brightview Mt. Laurel  
Driver to Business Office Manager

**Christina Roberts**  
Brightview Tarrytown  
Dining Server to Senior Dining Server

**Kevin Spearin**  
Brightview Commons  
Cook to Dining Room Manager

**Leslie Garrido**  
Brightview Warren  
Housekeeper to Senior Housekeeper

**Mary Jean McCarthy**  
Brightview Fallsgrove  
Wellness Nurse to  
Wellspring Village Director

**Meghan Rubie**  
Brightview Severna Park  
Vibrant Living Assistant to  
Community Sales Associate

**Nicholas Lantych**  
Brightview North Andover  
Dining Server to Dining Room Manager

**Patricia Morency**  
Brightview Warren  
Senior Concierge to  
Business Office Manager

**Raqeeb Khan**  
Brightview Great Falls  
Vibrant Living Assistant to  
Vibrant Living Director

**Richard Wolf**  
Brightview Westminster Ridge  
Maintenance Technician to  
Maintenance Director

**Savannah Steeves**  
Brightview Danvers  
Resident Assistant to  
Senior Resident Assistant

**Skye Steeves**  
Brightview Danvers  
Dining Server to Senior Dining Server



## BRIGHTVIEW SENIOR LIVING AWARD WINNERS

**Associate Engagement Award**  
Brightview Great Falls  
Brightview Randolph

**Resident Satisfaction Award**  
Brightview Great Falls

**President's Club**  
Brightview Baldwin Park  
Brightview Catonsville  
Brightview Fallsgrove  
Brightview Perry Hall  
Brightview Towson

**Chairman's Club**  
Brightview Great Falls  
Brightview Greentree  
Brightview North Andover  
Brightview Severna Park  
Brightview South River  
Brightview Westminster Ridge

**Significant Operations  
Achievement Award**  
Brightview North Andover  
Brightview Towson

**Significant Sales Achievement  
Award**  
Brightview Paramus

**I SPY "SuPAW STAR" Safety  
Award**  
New Pond Village

**I SPY "Spot On" Safety Award**  
Brightview Avondell  
Brightview Bel Air  
Brightview Concord River  
Brightview East Norriton  
Brightview Mays Chapel Ridge  
Brightview Perry Hall

**The Tricia Lilly Ourand Award**  
Alan LeMay  
Community Sales Director  
Brightview Catonsville

**Pic a STAR of the Year**  
Darby Boyle  
Driver  
Brightview Rolling Hills

**Associate of the Year (Hospitality)**  
Yahira Pena  
Senior Concierge  
Brightview Mount Laurel

**Associate of the Year (Caregiver)**  
Susan McCoy  
Resident Assistant  
Brightview Greentree

**Coach of the Year (Hospitality)**  
Jennifer Buchanan  
Business Office Manager  
Brightview Baldwin Park

**Coach of the Year (Caregiver)**  
Kim O'Connell  
Wellspring Village Director  
Brightview Country Club Heights  
and Brightview North Andover

**Coach of the Year (Executive  
Director)**  
Marie Milano  
Brightview Randolph

**Community of the Year**  
Brightview Severna Park

## SHELTER PROPERTIES AWARD WINNERS

**STARS Service**  
Brandon Teetsel  
Maintenance Apprentice  
Park View at Naaman's Creek

**STARS Teamwork**  
TEAM Owen Brown  
Tina Roman  
Property Manager  
Charlie Rout  
Area Maintenance Supervisor

Sharon Johnson  
Assistant Property Manager  
Lito Salgado  
Maintenance Supervisor  
Damian Forde  
Porter

**STARS Action**  
Carl Wyatt  
Maintenance Supervisor  
Park View at Towson

**STARS Reputation**  
Megan Norwood  
Property Manager  
Park View at Tyler Run and  
Park View at Manchester Heights

**STARS Success**  
Andrew Liro  
Property Manager  
Park View at Ellicott City I and  
Park View at Ellicott City II

**Excellence in Service**  
Lito Salgado  
Maintenance Supervisor  
Park View at Snowden River

**Excellence in Compliance**  
Annmarie Corea  
Assistant Property Manager  
Monarch Mills

**Excellence in Operations**  
Ming-Lun Wu  
Assistant Property Manager  
Park View at Ellicott City I and  
Park View at Ellicott City II

**Excellence in Wellness**  
Nicole Howard  
Assistant Property Manager  
Park View at Ashland Commons  
and Ashland Commons

**Excellence in Resident Services**  
Susan Coiner-Pollard  
Property Manager  
Park View at South Pantops

**Significant Achievement**  
TEAM York Commons  
Carole Burrell  
Property Manager  
David Thompson  
Maintenance Supervisor

**Circle of Honor Recipient**  
Madhi Nur  
Maintenance Supervisor  
Westbrook Commons

**Circle of Honor Recipient**  
Mike Birchfield  
Senior Maintenance  
Supervisor  
Woodbridge Commons

**Circle of Honor Recipient**  
Charlie Rout  
Area Maintenance Supervisor  
Owen Brown

**Maintenance Supervisor  
of the Year**  
William Ewell  
Park View at South Pantops

**Property Manager of the Year**  
Bridget Monroe  
Park View at Dundalk

**Community of the Year**  
Cambridge Commons

# Congratulations to all!

