

GERONTOLOGICAL SERVICES, INC.

Consultants

SPECIALISTS IN
HOUSING, SERVICES AND PRODUCTS
FOR OLDER ADULTS

2009



Gerontological Services, Inc.

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CLIENT SERVICES

Gerontological Services, Inc. (GSI) is a multi-disciplinary team which works with its clients to assess consumer demand, position new and existing product lines, and develop strategies and programs for successful implementation. Our professional backgrounds include gerontology, research, administration, planning, design, marketing, and data systems architecture.

GSI's strengths are:

- Our principals have over ninety-five years of hands-on industry experience, nationwide.
- Strong alliances with other professionals in our fields, which allow us to provide integrated services, such as financial and sensitivity analysis; financing; operations management; architecture; total quality management services and clinical outcomes analysis.
- In-depth understanding of the older market across the country, with an actively maintained database of over 50,000 older consumer survey respondents, which we use to identify market trends.
- Demonstrated expertise in market research and feasibility studies, and in translating the findings into recommendations for successful and innovative programs. We take pride in our ability to design our studies to reflect the needs of each client and the nuances of a specific market.
- The long-term stability in our staff, which is dedicated to the field of aging and technology, and to creating judicious, yet innovative solutions.
- Constantly updated information on trends in retirement housing services and health care.

GSI structures its work to complement and augment the in-house capabilities of our clients. We invite you to contact them concerning the timeliness, quality, integrity, and value of our work, and our years of experience in the industry. Our services, which are described on the following pages, include:

- Market research and feasibility
- Project review and facility repositioning
- Strategic planning
- Operational and space programs, and proforma budgets
- Financial feasibility and forecasts
- Architectural review and critique
- Marketing plans and implementation
- Information/data management systems evaluation and consultation
- Total quality management
- Clinical outcome studies
- Expert witness/testimony



MARKET RESEARCH AND FEASIBILITY

GSI works with non-profit and proprietary sponsors in the private and public sectors and with financing institutions throughout the country to assess market demand and feasibility of shelter, services, and health-care products for older adults. Our reports provide an in-depth assessment of a specific market and our recommendations for product development and positioning are suitable for submission to regulatory agencies and financing entities. Product-lines include retirement housing; congregate housing; assisted living; skilled nursing facilities; special care units; community-based and home delivered services; and hospital geriatric specialties and programs. Components include:

Demographic and Competitive Analysis: We collect and analyze a broad spectrum of published and unpublished data within a specified market area. The result is an *initial feasibility study* based on demographics, competition, and industry experience. Analysis includes age and income statistics and trends; housing values; vacancy rates and existing and proposed competition within the primary market area. This analysis delineates the size and depth of the potential market, and serves as a first cut in the "go or no go" stage of a development project.

Consumer Research, Product Positioning, and Feasibility: Market surveys, face-to-face interviews and other primary data collection methods are employed to measure consumer demand and preferences. These primary data are exceedingly valuable for making decisions involving site location; unit size and mix; service and amenity packages; pricing; and financial/contractual arrangements. They provide a profile of the target market for future marketing plans. The data are also used to determine site and product specific market feasibility, and to develop space and operational programs and budgets.

GSI has designed and implemented market surveys for both existing and proposed facilities and product lines. Our experience indicates that a direct mail survey which protects the anonymity of the respondent:

- *Is the best method of reaching the older consumer.*
- *Generates qualified and interested leads.*
- *Serves as a primary marketing strategy.*
- *Is increasingly important to financing agencies and institutions in their evaluation.*



STRATEGIC TECHNOLOGY PLANS

As technology proliferates throughout the long-term care industry, frustration and costs are rising commensurately. The typical application of technology follows the model of single problem/single solution, in which an organization purchases separate and potentially incompatible systems. This leads to increased complexity for the facility staff, the maintainers, and the consumers/residents, which in turn translates into increased costs and frustration. Inappropriate coupling of functions or technologies can result in single points of system failure, sometimes in critical areas.

The greatest success and cost efficiency occurs when the technology employed operates not only as an information engine, but also provides added value, such as improved data collection or system redundancy to assure continuous operation even during a power or system failure.

Despite these hurdles, technology is becoming increasingly crucial to the effective management of both the corporate and residential dimensions of long-term care and senior living.

A technology strategy is not simply a cohesive information management system, but encompasses an evaluation of all aspects of the business in relation to the available (and anticipated) technologies that can support the business functions. These functions include transportation, security, energy management, accounting, communications, resident census, patient care and staff management, to name a few.

The process of devising a technology strategy is a powerful exercise in complex systems analysis that invariably produces an economy of technology usage. This economy is derived not just from a cost/benefit analysis, but also through the recognition that one technology can perform a multitude of functions, thus reducing training and support costs.

GSI, with its sister organization, Gerontological Solutions, Inc., facilitates the development of the Strategic Technology Plan either as part of the organization's overall Strategic Plan, or as a separate component.

PROJECT REVIEW AND FACILITY REPOSITIONING

GSI works closely with its clients to provide an objective critique and to identify strengths and challenges to a facility's short-term and long-range viability. We review all aspects including market and financial data; operational programs/assumptions; marketing strategies; plans and performance. We identify market niches and provide recommendations to enhance overall performance. Public and private sector financing and regulatory agencies and organizations commission our work as part of the development or repositioning team to ensure an unbiased approach. Components of the work may include:

- *Marketing and Management Audit*
- *Environmental Assessment*
- *Budget Analysis*
- *Strategic Planning*
- *Market Assessment*
- *Resident Satisfaction*
- *Management, Board and Staff Surveys*
- *Architectural Review and Critique*



STRATEGIC PLANNING

GSI provides technical assistance and market data to assist the client in the strategic planning process. The principals of the firm act as facilitators for Board and/or Staff retreats or planning sessions to identify corporate goals and objectives. Our consulting roles include development of strategies and outlines of tasks on the critical path to implementation, as well as leading ongoing corporate planning.

OPERATIONAL AND SPACE PROGRAMS, AND PROFORMA BUDGETS

Based on the data from the market analysis, GSI develops operational programs. The documents describe each department, its function and staff, and how they relate to the total operation of the facility or program. Proforma operating budgets are developed to reflect existing local conditions and policies. Design directives and space programs are based on consumer demand data and operational efficiency.

FINANCIAL FEASIBILITY AND FORECASTS

GSI, in conjunction with *William D. Hendrickson*, principal of *Hendrickson Consulting* (HC), also prepares financial forecasts and develops the analysis of revenue, expenses, cash flow, and balance sheets. The working relationship between GSI, a firm with its overall market analysis/feasibility, operational and marketing expertise, and HC, with financial capabilities, allows us to provide financial assessments that remain sensitive to trends and respond to the realities of the market.

ARCHITECTURAL REVIEW AND CRITIQUE

GSI works with project architects to translate market data and operational programs into schematic designs, which meet the demands of the market. We review and comment on the drawings through the design development stage and work with the development team to assure that construction costs do not exceed the target market's desire and/or ability to pay. Innovative spaces and functions, which will assure the long-term viability of the project, are emphasized.



MARKETING

GSI works with clients from pre-marketing through stabilized occupancy. These services include:

Marketing Plans: Based on the characteristics of the target market, GSI develops a marketing plan, which details the strategies to be used to reach the consumer. This includes budgets and schedules, staffing and media selection.

Marketing Materials: We work with the client's marketing department or design firm to develop the logo, signage and collateral materials for the sales effort. We assist in selection of models and accoutrements for photographs; write copy for brochures, audio/visual materials, and resident forms; and review layout and design for media presentations.

Marketing Office Training: GSI coordinates the physical layout and decor of the marketing office and model unit, if appropriate. We assist the client in the interviewing and selection of sales personnel, and provide training in the nuances of selling to this selective market.

INFORMATION/DATA MANAGEMENT SYSTEMS EVALUATION AND CONSULTATION

GSI has the multi-disciplinary expertise needed to provide evaluation, training, and consultation services for a variety of data and information management systems. Some systems in which we provide support are: computerized management of residents and services; development of customized integrated software; marketing office management; and security systems. Our combination of expertise in computer/software systems and retirement housing and services is unique in the field; therefore, we are positioned to be strong advocates for the "computer innocent" in the maze of modern technology.

TOTAL QUALITY MANAGEMENT

The multi-disciplinary expertise of GSI, and its affiliate, *Vital Research*, is brought to bear in assisting our clients in the development of a total quality management (TQM) process. This may include consumer satisfaction evaluation and monitoring systems, environmental and service assessment; and management training for action plan development.

CLINICAL OUTCOME STUDIES

GSI, in conjunction with *Vital Research*, can assist our clients in developing systems to determine and document the outcomes of health, wellness, and supportive services.

EXPERT WITNESS/TESTIMONY

GSI is often called upon to provide testimony on issues related to aging, particularly in the areas of housing and health care. This includes testimony for government bodies and in court cases concerning fair housing and "best practices" issues.



REPRESENTATIVE CLIENTS

RETIREMENT AND CONTINUING CARE COMMUNITIES

15 Craigsid eHonolulu, HI
 450-460 N. Palm, LLC..... Beverly Hills, CA
 Aegis Senior LivingSanta Rosa, CA
 The Alhambra.....Alhambra, CA
 Allied Jewish Federation.....Denver, CO
 American Baptist Homes
 of the West Oakland, CA
 Arcadia Retirement
 ResidenceHonolulu, HI
 Arizona Baptist
 Retirement Centers.....Phoenix, AZ
 Asbury Heights Methodist
 Services for the Aging.....Pittsburgh, PA
 Asbury Methodist VillageGaithersburg, MD
 Atherton Baptist HomesAlhambra, CA
 Baptist Homes of
 Western PAPittsburgh, PA
 Baptist Memorials CenterSan Angelo, TX
 Barbary Lane Communities ..Oakland, CA
 Benchmark AL:
 BeretaniaHonolulu, HI
 Borthwick Forest.....Portsmouth, PA
 Brandon Oaks Virginia
 Lutheran HomesRoanoke, VA
 Brookhaven at Lexington.....Holyoke, MA
 Brothers of Saint John
 of GodMonterey, CA
 Browning Masonic Home Toledo, OH
 Cambridge Living
 Options/Elders.....Cambridge, MA
 Canterbury Episcopal Home
 CommunitiesRancho Palos Verdes, CA
 Canterbury House.....Bremerton, WA
 Carlsbad by the Sea.....Carlsbad, CA
 Casa de las CampanasRancho Bernardo, CA
 Catholic Charities CYO of
 Marin CountyMarin County, CA
 Center for Elder
 Independence.....Oakland, CA
 Claremont House.....Berkeley, CA

Charter House Rochester, MN
 China Life..... Taipei, Taiwan
 Chris Ridge Village Phoenix, AZ
 Clairmont House..... Oakland, CA
 Claremont Retirement
 Management Services..... Walnut Creek, CA
 Classic Residence by Hyatt .. CA & IL
 Cliffdale Park..... Greenwich, CT
 Collington Episcopal
 LifeCare Mitchellville, MD
 Congregate Care Cmmts..... Boca Raton, FL
 Constellation Senior
 Services..... Oakland, CA
 The Covington Aliso Viejo, CA
 Craigsid e Arcadia Hawaii..... Honolulu, HI
 Crystal Ridge Klamath Falls, OR
 Crystal Springs Investors:
 Versailles San Mateo, CA
 Cypress Knolls Monterey, CA
 Satellite Sr. Homes, Inc.*
 Deaf Senior Housing Project Fremont, CA
 Denver OLLI Denver, CO
 Deupree Terrace Cincinnati, OH
 Dividend Devlpmnt. Corp. Saratoga, CA
 Duncaster Bloomfield, CT
 Eastern Star Home Los Angeles, CA
 Elder Care Alliance Oakland, CA
 England Oaks..... Alexandria, LA
 Episcopal Homes Alhambra, CA
 Episcopal Homes
 Communities..... Los Olivos, CA
 Episcopal Homes
 Foundation Lafayette, CA
 Episcopal Homes Foundation
 Blackhawk Brentwood, CA
 Episcopal Retirement
 Homes, Inc.: Stoneybrook Cincinnati, OH
 Episcopal Retirement
 of WA Seattle, WA
 ERA Care..... Seattle, WA
 Eskaton Carmichael, CA
 Evergreen Retirement
 Community Oshkosh, WA





RETIREMENT AND CONTINUING CARE COMMUNITIES (CONT.)

Fellowship Square
 Christian Care.....Phoenix, AZ
 Florida Brethren Homes Inc..Sebring, FL
 Foss Home.....Seattle, WA
 Franciscan Services.....Naples, FL
 Franciscan Village.....Lamont, IL
 Franke Tobey Jones.....Tacoma, WA
 Gilbert Hill.....Georgetown, CT
 Glenmeadow.....Longmeadow, MA
 Green Hills Center.....West Liberty, OH
 Greensburg Presbyterian
 Guardian Foundation.....Greensburg, PA
 Greenstone Homes.....Spokane, WA
 Gurwin Jewish Geriatric
 Center.....Commack, NY
 Hale Makua.....Maui, HI
 Hawaii Village Associates:
 Luana Koa.....Kapolei, HI
 Hearthstone Retirement
 Community.....Seattle, WA
 Hebrew Rehabilitation
 Center for the Aged.....Boston, MA
 The Heritage.....Appleton, WI
 The Heritage.....San Francisco, CA
 Heritage on the Eastern
 Shore.....Onancock, VA
 Heritage Palmeras.....Sun City, AZ
 The Hermitage at Cedarfield.Richmond, VA
 Hermitage in Northern VA....Alexandria, VA
 Hillcrest Homes.....La Verne, CA
 Homestead Village, Inc.....Lancaster, PA
 Horizon House.....Seattle, WA
 Isabella Ridgeway.....Columbus, OH
 John Hancock Insurance.....Boston, MA
 John Knox Village.....Tampa, FL
 Joseph L. Morse
 Geriatric Center.....West Palm Beach, FL
 Kane Company.....Portsmouth, NH
 Keiro Japanese Home.....Los Angeles, CA
 Kensington.....Alhambra, CA
 KG Land Corporation.....Oakland, CA
 Kingsley Manor.....Los Angeles, CA

La Vida Del Mar.....Solana Beach, CA
 Lifelong Living, Learning,
 & Longevity LLC.....Denver, CO
 Lifelong Living, Learning,
 & Longevity.....Rohnert Park, CA
 LifeSpan Services, Inc.....New Canaan, CT
 Lionel Salin.....Monterey, CA
 Longwood at Oakmont.....Verona, PA
 Loomis Communities/
 Hampshire College.....S. Hadley, MA
 Los Angeles Jewish Home
 for the Aging.....Reseda, CA
 The Marjorie P. Lee Home...Cincinnati, OH
 Masonic Homes of CA.....San Francisco, CA
 Mary's Woods at Marylhurst...Lake Oswego, OR
 Massachusetts Mills.....Lowell, MA
 Mather Lifeways.....Evanston, IL
 The Medallions.....Colorado Springs, CO
 Meadowbrook Village Christian
 Care Center.....Escondido, CA
 Medford Leas.....Medford, NJ
 Mennonite Village.....Albany, OR
 Methodist Manor/
 Wesley Park.....West Allis, WI
 Milan Properties.....Anaheim, CA
 Milan Properties, LLC.....Del Mar, CA
 Minnesota Masonic Home....Bloomington, MN
 Missionary Sisters
 of the Sacred Heart.....Chicago, IL
 MonteCedro.....Altadena, CA
 Mountain Meadows.....Ashland, OR
 Morse Geriatric.....West Palm Beach, FL
 Mt. San Antonio Gardens.....Pomona, CA
 NBA CA Christian Home
 Norris/Roberts Group.....Phoenix, AZ
 NCB Development Corp.....Arkansas
 NCPH Zen Center.....San Francisco, CA
 Northern California
 Presbyterian Homes.....San Francisco, CA
 O'Connell Engineering and
 Financial.....Holyoke, MA
 Oakmont Senior Living.....Santa Rosa, CA
 OpenHouse.....San Francisco, CA
 Orange County.....Irvine, CA
 Orchard Cove.....Canton, MA





RETIREMENT AND CONTINUING CARE COMMUNITIES (CONT.)

Pacific Life CareSanta Rosa, CA
 Pacific Retirement Services...Foster City, CA
 Pacific Retirement Services
 Meriter.....Madison, WI
 Pacific Retirement Services
 MirabellaPortland, OR
 Pacific Retirement Services
 San Luis ObispoSan Luis Obispo, CA
 Palolo Chinese Home.....Honolulu, HI
 PennyfarthingSan Diego, CA
 Pennyfarthing Development, Vancouver, BC
 CorporationCanada
 Paradise Valley EstatesFairfield, CA
 The Perry at Cabrini Ctr.....Seattle, WA
 Pickwick Park.....Greenwich, CT
 Philadelphia Baptist Homes ..Philadelphia, PA
 Pilgrim PlaceClaremont, CA
 Plante & Moran:
 First Community Village.....Toledo, OH
 Plumas County*Fair Oaks, CA
 Presbyterian Homes in the
 Presbytery of Lake Erie.....Erie, PA
 Presbyterian Homes of GA ...Austell, GA
 Presbyterian Homes of GA ...Quitman, GA
 Presbyterian Senior Care.....Washington, PA
 Presbyterian SeniorCare:
 Johnstown & LongwoodOakmont, PA
 Providence Health SystemPortland, OR
 Providence Benedictine
 Nursing Center Mt. Angel.....Mt. Angel, OR
 Queen Emma Foundation.....Waipahu, HI
 Rainbow Vision.....Palm Springs, CA
 Rainbow Vision.....Santa Fe, NM
 Redstone Presbyterian Care ..Greensburg, PA
 Redwood Marina.....Redwood City, CA
 The Redwoods.....Mill Valley, CA
 Regina Health CenterRichfield, OH
 Regis College Retirement
 Community.....Weston, MA
 Reliable PropertiesLos Angeles, CA
 Retirement LivingRosemead, CA
 RIMCO PropertiesPittsburgh, PA

Riverview Retirement
 Community Spokane, WA
 Roanoke United
 Methodist Homes..... Roanoke, VA
 Rochester Friendly
 Senior Services Rochester, NY
 Rockwood Retirement
 Community Spokane, WA
 Royal Oaks Duart, CA
 Ryserson Corporation Phoenix, AZ
 Saint Claire Regional
 Medical Center Morehead, KY
 Saint John's Health Center Santa Monica, CA
 Saint John's Lutheran
 Home Billings, MT
 Salem Lutheran Home Oakland, CA
 San Joaquin Gardens Fresno, CA
 Sanport Development Mission Viejo, CA
 Santa Catalina Villas Tucson, AZ
 Santa Ynez Episcopal
 Homes Communities Santa Ynez, CA
 Satellite Sr. Homes, Inc.* Fremont, CA
 SCM Capital Company..... Escalon, CA
 Scripps Home Episcopal
 Home Communities Alhambra, CA
 Sickles Stampley..... Huntington Bch., CA
 Sisters of the Holy Names
 of Jesus and Mary Spokane, WA
 Smith Mountain Lake
 Family Development Corp. .. Moneta, VA
 Solheim Lutheran Home..... Eagle Rock, CA
 Sonoma Mountain Village.... Rohnert Park, CA
 Southern California
 Presbyterian Homes. Las Vegas, NV
 Spring Lake Village Episcopal
 Homes Foundation..... Santa Rosa, CA
 Stonewall Communities..... Boston, MA
 Sunny Acres of Colorado Denver, CO
 Sunset Manor Upland, CA
 The Terraces of Los Gatos.... Los Gatos, CA
 Terwilliger Plaza..... Portland, OR
 Three Bridges at
 Castle Pines..... Castle Pines, CO
 Three Bridges at Santa
 Rosa Santa Rosa, CA



 RETIREMENT AND CONTINUING CARE COMMUNITIES (CONT.)

Traditions of the Palm
 Beaches West Palm Beach, FL
 TriCal Marina Del Rey, CA
 UCLA Alumni Association... Los Angeles, CA
 United Methodist Homes
 for the Aging Mt. Lebanon, PA
 University Village Thousand Oaks, CA
 The Urban Group Philadelphia, PA
 Vernon Court..... Newton, MA
 Villa Campana..... Tucson, AZ
 Village at Willow Crossing ... Mansfield, MA
 Vincentian Collaborative
 Services Pittsburgh, PA
 Virginia Lutheran Homes:
 Brandon Oaks..... Salem, VA
 Virginia United
 Methodist Homes Richmond, VA
 Virginia United Methodist
 Homes: WindsorMeade Williamsburg, VA
 The Wall Development
 Corporation Venice, FL
 Walnut Manor Anaheim, CA
 Washington Retirement
 Parks..... Seattle, WA
 Western Homes Cedar Falls, IA
 Westminster-Canterbury Irvington, VA
 Wexner Heritage Village..... Columbus, OH
 White Sands of La Jolla La Jolla, CA
 Windsor Manor Glendale, CA
 Woodlands Retirement
 Center Baptist Memorial Burnet, TX

 LONG-TERM CARE SERVICES & NURSING HOMES

Aldrich Eastman Waltch Boston, MA
 Bensenville Homes..... Bensenville, IL
 Blumenthal Jewish Home Clemmons, NC
 Buena Vista Manor Duarte, CA
 Chaparral House..... Berkeley, CA
 Elder Care Alliance* Pasadena and Union
 City, CA

Fallbrook Retirement Ctr..... Canoga Park, CA
 Florence Home Omaha, NE
 Holyoke Geriatric Authority* Holyoke, MA
 Home for Jewish Parents Oakland, CA
 The Kensington: Holt Hall.... Alhambra, CA
 Madsen Corporation Madison, WI
 Maria Joseph Center Danville, PA
 Mary E. Bivins Foundation... Amarillo, TX
 Masonic Homes of CA Union City, CA
 Midwest Geriatrics, Inc. Omaha, NE
 Mt. Saint Joseph Portland, OR
 Our Lady of Fatima Villa Saratoga, CA
 Pinole Redevelopment
 Agency* Pinole, CA
 Rose Lane Massillon, OH
 Southland Lutheran Home.... Norwalk, CA
 Saint Antoine Residence*..... N. Smithfield, RI
 Saint John's Lutheran Home Billings, MN
 Smith Mountain Lake Moneta, VA
 The Village at Manor Park ... West Allis, WI
 WRC Senior Services Brockway, PA

 HOSPITAL DIVERSIFICATION

Anchor Health, Inc West Allis, WI
 Baptist Hospital and
 Health System..... Phoenix, AZ
 Community Hospital of
 Ottawa..... Ottawa, IL
 Crestwood Hospitals, Inc..... Pleasanton, CA
 Good Samaritan Health
 Systems..... Kearney, NE
 Holy Cross Hospital..... Silver Spring MD
 Hospital District 7..... Calgary, Alberta, Canada
 Huntington Memorial
 Hospital..... Pasadena, CA
 Ideal Sr. Living Center Endicott, NY
 Lutheran Medical Center Wheat Ridge, CO
 Menomonee Falls Comm.: Menomonee Falls,
 Hospital..... WI
 Jewish Home and Hospital
 Lifecare System. New York, NY
 Massillon Cmnty. Hosp. Massillon, OH
 McKenzie-Willamette
 Hospital..... Springfield, OR



 **HOSPITAL DIVERSIFICATION**
(CONT.)

Mercy Medical Center.....Nampa, ID
 Merle West CorporationsKlamath Falls, OR
 O'Connor Home Health
 CareSan Jose, CA
 Overlake Hospital
 Medical CenterBellevue, WA
 Rose Lane.....Massillon, OH
 Saint Joseph's Mercy
 HospitalPontiac, MI
 San Antonio Cmnty. Hosp. Upland, CA
 The Senior Care Network Pasadena, CA
 Medical Center San Francisco, CA
 Saint Alphonsus HospitalBoise, ID
 Saint John's Health Center....Santa Monica, CA
 Saint Joseph's HospitalMt. Clemens, MI
 Saint Mary's Hospital &
 Saint Vincent HospitalBillings, MO
 Sisters of Charity
 Health Care SystemsCincinnati, OH
 Sisters of Mercy, Province
 of Detroit, Inc.Detroit, MI
 Stamford Health SystemStamford, CT
 St. Claire Regional
 Medical CenterMorehead, KY
 United Health GroupAppleton, WI
 United Health Services.....Johnson City, NY
 Valley Memorial Hospital....Livermore, CA
 Verdugo Hills HospitalGlendale, CA
 Waukesha Memorial
 Hospital, Inc.Waukesha, WI

 **SPECIAL CONSULTANTS**

900 Years, LLC.....Los Angeles, CA
 A&B Properties.....Honolulu, HI
 Aldrich Eastman WaltchBoston, MA
 Alternative Living for the
 Aging.....Los Angeles, CA
 American Association of
 Homes and Services for
 The AgingWashington, DC
 American Baptist HomesOakland, CA

Barrington Plaza Los Angeles, CA
 Beachview Villas Huntington Bch., CA
 The Beacon Companies Boston, MA
 Boston Capital Boston, MA
 CA Association of Homes and
 Services for the Aging Sacramento, CA
 California Christian Homes .. Rosemead, CA
 California Senate Office of
 Research..... Sacramento, CA
 Carr, John..... Bridgewater, CT
 Center for Healthy Aging Santa Monica, CA
 Church Homes, Inc. Hartford, CT
 Citibank-Canada Vancouver, B.C., Canada
 Classic Residence by
 Hyatt Chicago, IL and Los Angeles, CA
 Comprehensive Retirement
 Communities..... West Bloomfield, MI
 Congregate Lifestyles, Inc. &
 Batemen Eichler, Hill Richards
 Realty Co. Boca Raton, FL
 Coventry CareLink Linthicum, MD
 Douglas, Lewis W. Westwood, CA
 Eaton Vance..... Boston, MA
 Fenton Partners Solano Beach, CA
 Forest City Development..... Los Angeles, CA
 The Griffin Group..... Los Angeles, CA
 The Guardian Foundation.... Berkeley, CA
 Hanson Bridgett, Marcus
 Vlahos, and Rudy San Francisco, CA
 Harvard Community Health
 Plan Boston, MA
 Herron Hill..... Sea Ranch, CA
 Holyoke Geriatric Authority. Holyoke, MA
 Horizon House Seattle, WA
 The Immaculate Heart
 Community Los Angeles, CA
 Invespar, Inc. Oakland, CA
 Jewish Association on Aging Pittsburgh, PA
 Jewish Home of Aged..... Detroit, MI
 KG Land CA Corporation Oakland, CA
 Kaufman and Broad
 Multi-Housing Group* Long Beach, CA
 Ken Ruby Construction Co... Los Angeles, CA
 The Kendal Corporation Kennett Square, PA
 Kern County Superintendent
 of Schools Bakersfield, CA



 **SPECIAL CONSULTANTS** (CONT.)

Laguna Honda Hospital.....San Francisco, CA
Lamont EnterprisesGuadalajara, Mexico
Living Care Retirement
Community.....Yakima, WA
Loomis CommunitiesSouth Hadley, MA
Lutheran Home.....Cleveland, OH
Lutheran Homes and
Services for the AgedArlington Heights, IL
Lutheran Hospital Society Center
For Health Mgmt. Research ..Los Angeles, CA
Massachusetts Housing
Finance Agency.....Boston, MA
Mendocino Presb. Church.....Mendocino, CA
Milwaukee Protestant Home .Milwaukee, WI
NCB Development Corp.....Washington, DC
New Canaan Inn and
Waveny Care CenterNew Canaan, CT
Northern CA Presb. Homes...San Francisco, CA
One KalakawaHonolulu, HI
Open CircleWashington, DC
Orchard Downs UIUC.....Urbana, IL
Pacific HomesWoodland Hills, CA
Pacific Retirement Services ..Medford, OR
Parkside Senior ServicesArlington Heights, IL
Park Stanton Senior Apts.* ...Stanton, CA
Professional Liability
Practice Group.....Philadelphia, PA
Presbyterian Senior Care.....Oakmont, PA
Queen Emma Foundation.....Honolulu, HI
Retirement Research
FoundationPark Ridge, IL
Rockwood Retirement
Community.....Spokane, WA
SFSI Baty Stiles Capital
Management.....Portland, OR
Saint Anne's Maternity
HomeLos Angeles, CA
Saint Catherine's
by the SeaBuenaventura, CA
Saint Joseph's Convalescent
HospitalOjai, CA
Saint Marks in the Valley.....Los Olivos, CA
Secure HorizonsGarden Grove, CA

Senior Health & Peer
Counseling..... Santa Monica, CA
Senior Living Communities.. Long Beach, CA
The Sickles Group Dayton, OH
Sierra Winds Sun City, AZ
Southern CA Presb. Homes:
Springs at Lone Mountain Las Vegas, NV
Stanford Faculty Staff
Housing Office Stanford, CA
SRS of Our Lady of
Fatima Villa Saratoga, CA
SRS of Saint Joseph of
Carondolet Los Angeles, CA
State of CA Dept. Social Services
Lifecare Contracts Division.. Sacramento, CA
United HealthCare Minneapolis, MN
Virginia Creek Village..... Incline Village, NV
Vital Research..... Los Angeles, CA
The Wilshire Foundation Los Angeles, CA

 **DESIGN REVIEW**

American Tectonics Cincinnati, OH
Arcadia Retirement
Residence..... Honolulu, HI
Barry Swenson..... San Jose, CA
Carlsbad by the Sea Carlsbad, CA
First Chicago Investment
Advisors..... Chicago, IL
Hillcrest Homes La Verne, CA
Merle West Corporations..... Klamath Falls, OR
Pacific Life Care Santa Rosa, CA
Project Control Group, Inc ... Salt Lake City, UT
The Raiser Organization San Mateo, CA

 **SENIOR CENTERS**

Baldwin Park Senior
Center Baldwin Park, CA
Chris Ridge Village Phoenix, AZ
Downtown Senior Center Madison, WI
Greenwich Senior Center..... Greenwich, CT
Mountain View Senior
Center Juneau, AK



 **SENIOR CENTERS** (CONT.)

Sunnyvale Senior Center.....Sunnyvale, CA
Washington County Elder
CareBartlesville, OK
Willamette Senior Activity
Center..... Eugene, OR

 **ASSISTED LIVING**

Aldersly Garden
Retirement CommunitySan Rafael, CA
Aldrich Eastman & Boston, MA &
Waltch Los Angeles, CA
Benchmark Assisted
LivingWellesley Hills, MA
Cardinal Paul Yu-Pin
FoundationBaldwin Park, CA
Chaparral House.....Berkeley, CA
Eastern Star Homes Los Angeles, CA
Elder Care Alliance*Pasadena, CA
Eskaton.....Carmichael, CA
Evergreen Retirement
Community.....Oshkosh, WI
Highland Oaks Assisted
Living Facility.....Shippenville, PA
The Jewish Association
Of PittsburghPittsburgh, PA
Jewish Federation of
Las VegasLas Vegas, NV
Mercy McMahon TerraceSacramento, CA
Moon TownshipOakmont, PA
Morse Geriatric Center..... West Palm Bch, FL
Our Lady of Fatima Villa.....Saratoga, CA
Pinn Brothers.....Cupertino, CA
Pinole Community
Development Department. Pinole, CA
Presbyterian Senior Care..... Washington, PA

Redstone Highlands..... Greensburg, PA
Retirement Inns of
America Tacoma, WA
RIMCO Properties Pittsburgh, PA
Rockwood Retirement
Community Spokane, WA
Saint John of God Los Angeles, CA
Silver Sky* Las Vegas, NV
Sisters of Charity Health
Care..... Cincinnati, OH
Sisters of Saint Joseph of
Orange Orange, CA
Talis Development La Canada, CA
Verdugo Hills Hospital..... Glendale, CA
Vernon Court Assisted
Living Facility Newton Center, MA
Villa Sienna Mountain View, CA

 (*) **AFFORDABLE HOUSING**

Cecil Oaks..... Jacksonville, FL
Elder Care Alliance Union City, CA
Holyoke Geriatric
Authority..... Holyoke, MA
Holyoke Housing Home
Corporation..... Holyoke, MA
J.R. Mullins Company Braintree, MA
Kaufman and Broad
Multi-Housing Group Long Beach, CA
Park Stanton Senior Apts..... Stanton, CA
Pinole Redevelopment
Agency..... Pinole, CA
Plumas County..... Fair Oaks, CA
Saint Antoine Residence..... N. Smithfield, RI
Satellite Sr. Homes, Inc.
Deaf Senior Housing Project Fremont, CA
Silver Sky.....Las Vegas, NV, NV



MARIA B. DWIGHT, *President and CEO*

Professional Experience

1982 -	:	President and CEO, Gerontological Services, Inc., Santa Monica, CA
1976 - 1982:		Vice President, Gerontological Planning Associates, Santa Monica, CA
1975 - 1976:		Director of Planning, Gerontological Planning Associates, Santa Monica, CA
1972 - 1975:		Chairman of the Board, Geriatric Authority of Holyoke, Holyoke, MA
1970 - 1975:		Consultant in Aging Services and Facilities
1966 - 1972:		Chairman of the Board, Municipal Nursing Home of Holyoke, Holyoke, MA
1966 - 1969:		Commissioner of Public Welfare, Holyoke, MA

Education

Leonard Davis School of Gerontology, Andrus Gerontology Center, University of Southern California, Master of Science, Administration

Hampshire College, Amherst, Massachusetts, Bryn Mawr College, Bachelor of Arts, Urban Studies

Professional Memberships

American Association of Homes and Services for the Aging	Gerontological Society of America
American Society on Aging	Aging Services of California
	Wise and Healthy Aging

Awards and Honors

- Achievement Award for Exemplary Leadership in Catholic Health Ministry, Sisters of Charity Health Care Systems, 1996
- National Advisory Council; 1981 White House Conference on Aging
- Dedication of Maria B. Dwight Building, Holyoke, Geriatric, 1977
- Who's Who in American Women, 1977 - Present
- American Association of Homes for the Aging, Presidential Citation, 1972
- Young Woman of the Year Award, 1963
- American Association of Homes and Services for the Aging, Chair's Citation, 2006
- Davis School of Gerontology at the University of Southern California, Alumna of the Year, 2008

Community Service

- American Association of Homes and Services for the Aging: Committee; former Member-at-Large, House of Delegates; Committees: Environmental Planning and Design; Continuing Care (Chair); Continuing Care Retirement Community, Leadership Development
- California Association of Homes and Services for the Aging, Development Committee Member
- Center for Healthy Aging, Santa Monica, CA, Board of Advisors
- Wise and Healthy Aging, Santa Monica Board of Advisors



Past Community Service

Board of Overseers, Heller School of Advanced Social Research, Brandeis University
Centura Health, Denver, CO, Board member
Design Evaluation - Social Uses of Elderly Housing, M.I.T./H.E.W., Advisory Committee
Junior League of Holyoke, Inc., President
Massachusetts Commission on Status of Women, Member
Massachusetts Department of Elder Affairs, Advisory Committee
Massachusetts Department of Public Welfare, Advisory Board
Massachusetts Housing Finance Agency, Advisory Board
National Council on the Aging, Planning Housing Environments for the Elderly, Advisory Committee
Urban Ministry, Inc., Past President and Founder
Western Massachusetts Health Planning Council, Vice President
White House Conference on Aging, National Advisory Committee, Delegate, 1981
Williston-Northampton School, Easthampton, MA, Board of Trustees

Testimony and Lectures

Aging Services of California (ASC formerly CAHSA)	National Association of Jewish Homes for the Aging
Quo Vadis: Berlin Germany 2008	American Hospital Association
Harvard University: Lead Faculty (1985-present): Graduate School of Design; Graduate Schools of Public Health, Medicine	Assisted Living Federation of America
Asian Conference: Bangalore University, India 2006	American Society on Aging
IAHSA Asian Conference: Hyderabad, India 2003	Association of Western Hospitals
Asian Health Conference Singapore 1998	National Association of Home Builders
International Association of Homes and Services for the Aging Conferences: Australia, England, Norway, Malta	National Association of Senior Living Industries
Boston University: School of Medicine	Multi-family Home Builders Association
University of Massachusetts	Office of Economic Opportunity
Mt. Holyoke College	U.S. House of Representatives Committee on Education and Labor
Hampshire College	Special U.S. Senate Committee on Aging
University of California: San Francisco, Los Angeles, Irvine, San Diego	Senate Committee on Housing and Urban Affairs
American Assn. of Homes and Services for the Aging	National Real Estate Development Center
Associations of Non Profit Homes: Arizona, California, Florida, Massachusetts, Virginia, Michigan, Colorado, Oregon, Washington	Northwest Center for Continuing Education
National Council of Jewish Women	Urban Land Institute
	University of Southern California: School of Architecture and School of Gerontology
	U.S. Conference of Mayor's Task Force on the Aging
	The Economist Conference: 2 nd Roundtable on Healthcare Systems in Asia



KAREN R. ADAMS, *Vice President*

Professional Experience

- 2002- : Principal, Gerontological Services, Inc., Santa Monica, CA
2001-2002: Principal, Third Age, Inc., Nevada City, CA
1997-2001: Vice President , AAHSA Development Corp. (ADC), Washington, DC
1993-1997: Director of Financial Services, AAHSA Development Corp. (ADC), Washington, DC
1983-1993: Vice President, Gerontological Services, Inc., Santa Monica, CA
1981-1983: Director of Planning, Gerontological Planning Associates, Santa Monica, CA
1978-1981: Research Assistant, Gerontological Planning Associates, Santa Monica, CA
1980: Consultant, Hamilton, Rabinovitz and Szanton, Los Angeles, CA
1977-1978: Research Assistant, The Philadelphia Geriatric Center, Philadelphia, PA

Education

- University of Southern California, M. Planning, Masters of Science, Gerontology,
Course work completed
The Pennsylvania State University, Bachelor of Science, Man-Environment Relations:
Environmental Planning

Professional and Community Memberships

- Adult Day Health Services, Nevada City, CA, *Board of Directors*
California Associations of Homes and Services for the Aging, *Board of Directors*
California Associations of Homes and Services for the Aging, *Organizing & Planning Development*
The Lutz Center Adult Day Services, *Board of Directors*
National Federation of Municipal Analysts, *Strategic Committee Member*
Senior Health and Peer Counseling Center, *Program Committee*
Heal the Bay, *Vice President of the Board of Directors*
Expert Witness, *Retirement Communities in Age Discrimination Law Suits*

Awards and Honors

- AAHSA Chair's Citation
Southern Section APA Award
1979 Scholarship Award in Environmental Design presented by the Irvine Company



Testimony and Lectures

MASS Aging Conference
LSN Annual Convention
WAHSA57th Annual Summer Conference
AAHSA Conference on the Future of Aging Services
American Association of Homes and Services for the Aging
Texas Association of Homes and Services for the Aging
Mass Aging
Oregon Alliance of Senior and Health Services
American Hospital Association

Books and Articles

"Applying Aging Trends and Demographics to Planning," (2004), An AAHSA Quality First Educational Resource

Direction and Coordination of Publications of the AAHSA Development Corporation:

Undertaking a Tax Exempt Bond Issue
Tax Exempt Bond Financing for Long-Term Care Projects
Financing Options for Development of Affordable Housing
Using Tax Credits for Housing for Older Adults
Understanding the Development Process



RALPH A. NOVAK, *Vice President of Planning*

Professional Experience

1999 - : Vice President of Planning, Gerontological Services, Inc., Santa Monica, CA
1996 - 1999: Director of Research, Gerontological Services, Inc., Santa Monica, CA
1995 - 1996: Research Assistant, University of California at Los Angeles, Los Angeles, CA
1994 - 1995: Graduate Student Researcher, Lewis Center for Regional Policy Studies,
University of California at Los Angeles, Los Angeles, CA
1994: Senior Data Processing Coordinator, University of California at Los Angeles
Department of Geography, Los Angeles, CA

Education

University of California, Los Angeles, Master of Arts, Geography
University of California, Los Angeles, Bachelor of Arts, Geography/Spatial Demography and Social
Processes in the City

Project Experience

Demographic Research & Consulting in: St. Louis, MO: Liddell vs. State of Missouri
St. Louis, MO: Jenkins vs. State of Missouri
Hillsborough CO., FL: Manning vs. BOE of Hillsborough County
Kansas City, MO; Los Angeles, CA; Milwaukee, WI; Minneapolis-St. Paul, MN

Professional, Academic, and Technological Expertise

Professional: Transportation planning and design; Commuting behavior; Urban form and historical
Academic: Perspectives regarding urban form; Demographic transition; Residential segregation according to race/ethnicity and class; Housing discrimination; Local and international migration; Urban poverty; Population geography (fertility, mortality, migration)
Technological: Statistical analysis (SAS and SPSS); Geographic Information Systems (ArcInfo and Atlas GIS)
Language: American Sign Language (ASL)

Awards and Honors

Associate Member, Gamma Theta Upsilon, International Geographical Honors Society

Professional and Community Memberships

Association of American Geographers



SUZANNE D. MANNING, *Director of Research*

Professional Experience

- 2002 - : Director of Research, Gerontological Services, Inc., Santa Monica, CA
2001 - 2002: Research Assistant, Gerontological Services, Inc., Santa Monica, CA
1999 - 2000: Research Intern, Relief International, Venice, CA

Education

University of California, Los Angeles, Bachelor of Arts, Political Science/International Relations;
Minor in Public Policy/Social Welfare

Professional, Academic, and Technological Expertise

- Academic* International Relations; Comparative Politics; Statistics; African politics, Urban poverty; Social welfare, Gerontology
- Professional* Data Analysis, Mapping programs
- Language:* Spanish

Awards and Honors

- Member, Pi Sigma Alpha, Political Science Honors Society
Member, Golden Key National Honors Society
Cum Laude, University of California, Los Angeles

Professional and Community Memberships

- UCLA Alumni Association
American Association of Homes and Services for the Aging
California Association of Homes and Services for the Aging



JULIA H. KWEL, *Research Assistant*

Professional Experience

- 2007 - : Research Assistant, Gerontological Services, Inc., Santa Monica, CA
2007 - 2007: Research Intern, China Academy of Urban Planning and Design, Beijing
2006 - 2008: Research Assistant, Fall Prevention Center of Excellence, Los Angeles, CA
2005 - 2006: Intern, County of San Diego Aging and Independent Services, San Diego, CA

Education

University of Southern California, Davis School of Gerontology, School of Policy, Planning, and Development, Dual Degree: Masters of Science in Gerontology and Masters of Planning, Degrees Expected May 2009

University of California, San Diego, Bachelor of Arts, Urban Studies and Planning; Minor in Visual Arts - Media

Professional, Academic, and Technological Expertise

- Academic* Urban Planning; Urban Design; Gerontology
Professional Data Analysis, Mapping programs, Urban Design Programs
Language: Chinese Mandarin

Awards and Honors

- Roberta and Wendell Close Scholarship, University of Southern California, 2007
- President, Sigma Phi Omega, Gerontology Academic and Professional Honors Society, 2007
- President, USC Student Gerontology Association, 2007
- Urban Land Institute Gerald D. Hines Student Urban Design Competitor, 2007
- Bert W. Martin Foundation Scholarship, University of Southern California, 2006
- Deans Merit Scholarship, University of Southern California, 2006-2008
- Charles Phan Health Research Award, University of California, San Diego, 2006
- Provost Honors List, Eleanor Roosevelt College, UCSD, Fall 04, Spring 05

Professional and Community Memberships

American Association of Homes and Services for the Aging

Association for Gerontology in Higher Education

California Association of Homes and Services for the Aging

Sigma Phi Omega



DIANE Y. CARSTENS, *Consultant*

Professional Experience

- 1995 - : Vice President, Gerontological Services, Inc., Santa Monica, CA
1986 - 1995: Vice President of Planning and Design, Gerontological Services, Inc.,
Santa Monica, CA
1985 - 1986: Director of Planning and Research, LeisureCare/Leisure Technology, Inc., Chicago, IL
1983: Project Manager, Project for Public Spaces, Inc., New York, NY
1981 - 1982: Researcher, Housing Research and Development, U. of Illinois, Urbana, IL

Education

University of Illinois, Urbana, Illinois; Master of Landscape Architecture/Applied Research
Mills College, Oakland, California, Bachelor of Arts; Psychology

Professional and Community Memberships

American Association of Homes and Services for the Aging
Environmental Design Research Association
California Association of Homes and Services for the Elderly

Awards and Honors

"Who's Who in the West", Marquis Who's Who, 22nd edition, 1990
Environmental Design Research Association, Research paper award, 1982
American Society of Landscape Architects, Certificate of Honor, Illinois, 1981

Past Community Service

- Department of Health, Bureau of Licensure and Certification, State of Alabama.
- Environmental Design Research Association, proposal and awards reviewer.
- Advisor/Resource Committee, Department of Landscape Architecture, University of Illinois
- S.W. Regional Council Representative, NASLI
- Invited participant, "Toward Empowering the Minority Elderly", a working conference sponsored by AARP
- Consultant/Advisor: Senior Health and Peer Counseling Center
- Design awards juror: American Society of Landscape Architects, California Chapter
- National Association of Home Builders, Council on Senior Housing



Testimony and Lectures

American Association of Homes and Services for the Aging
Harvard Graduate School of Design, visiting faculty 1987-90, 1994
California Association of Homes and Services for the Aging
California Association of Retirement Centers
Mayor's Office for the Disabled, City of Los Angeles
Oregon Association of Homes for the Aging
National Association of Home Builders
National Association for Senior Living Industries
National Real Estate Development Center
Northwest Center for Continuing Education
Environmental Design Research Association
University of Illinois, visiting faculty
University of Maryland, visiting faculty
Rutgers University, visiting faculty
Urban Land Institute
Building Design Issues and Aging Conference, University of Rhode Island

Books and Articles

"Environmental Design" section of the National Certification Program for Retirement Housing Professionals, Training Manual. American Association of Homes and Services for the Aging, Washington, DC, 1995.

Site Planning and Design for the Elderly: Issues, Guidelines and Alternatives. Diane Y. Carstens, Van Nostrand Reinhold, Co., NY, 1985. (published in the USSR, 1990)

"Shared Spaces in Elderly Housing", in People Places. Cooper-Marcus (ed.), Van Nostrand Reinhold, Co., NY, 1990.

"Behavioral Research Applied to the Redesign of Exterior Spaces: Housing for the Elderly", in Retirement Housing in Australia: Guidelines for Planning and Design. W. Sarkissian and Perfogut (eds.), Impact Press, Australia, 1986.

Book reviews for the Journal of Architectural and Planning Research (1986) and Landscape Journal (1986).

Housing for the Elderly: A Review of Selected References. D. Carstens and R. Clement, U. of Illinois, 1981.



LESLIE R. DWIGHT, *Vice-President of Technology*

Profile

Experienced leader in startup ventures as an executive, software developer, and manager. Skilled in full-cycle product development, from conception to installation and support. Expert technology systems architect. Enthusiastic team leader with a demonstrated ability to master new languages, platforms, and products. Established practice as an independent consultant. In-depth knowledge of banking, financial systems, gerontology, as well as a variety of hardware and software.

Professional Experience

STARTUP LEADERSHIP

- Founded and manage Gerontological Solutions, Inc. to develop technological solutions to the challenges of aging
- Organized and led creation of IT team for Health Resources Alliance
- Designed complete technology system strategy for Benchmark Assisted Living
- Led the development of Client Support and Quality Assurance procedures for Griffin Systems, Inc.
- Developed marketing documents, presentations, and strategies for a multi-faceted security product
- Organized and managed personnel in Client Support, QA, Accounting, and Marketing

INDEPENDENT CONSULTING

- Developed Strategic Technology Plan for Lutheran Senior Services and Health Resources Alliance
- System analysis, design, technical specifications, and prototyping for a high volume, real-time, security validation and execution quality analysis engine for Fidelity Investments of Boston, MA
- Money Market systems risk exposure analysis, design, and coding for Fidelity Investments of Boston, MA
- Technology system architecture design and implementation strategy for Benchmark Assisted Living
- Design and coding of international drafts system for First Interstate Bank of California
- Design and production of entertainment products for an independent inventor in Northampton, MA
- MIS organization and development of a subscriber maintenance system for a music magazine, "Forced Exposure"
- Development of a marketing survey database for Gerontological Services, Inc.



PRODUCT DEVELOPMENT

- Inventor, designer, project manager of a Personal Services and Amenities Management system for use in intentional communities.
- Architect, designer, and project manager of web-based data capture system for therapists
- Inventor, designer, GUI, network, and firmware developer of innovative fall detection system. Beta site installed in November 1997.
- Project leader in analysis, design, and programming of hardware and software for emergency response product.
- Architect and author of facility access software using Texas Instrument's proximity key card technology
- Project leader in development of half-million dollar electronic "draft capture" product. Required oversight and participation in the following areas:

Client Support	Program Design	Technical Documentation
Coding	Quality Assurance	User Documentation
Product Design	Specification Collection	
- Full cycle project manager of on-line corporate cash management system for large regional banks

Management

- Founded and managed technology development company designing products in the field of aging
- Chief Technology Officer for Health Resources Alliance, an Illinois Alliance representing over 200 facilities
- Managed personnel in Client Support, QA, Accounting, and Marketing for Griffin Systems
- Led large and small teams of software developers in separate, parallel projects for Windsor Systems
- Coordinated national team in development of complex banking product for Windsor Systems
- Managed year-long, multi-platform financial project to successful completion for Windsor Systems

Technical Summary

HARDWARE:

Stratus	IBM 4341	Koyo PLC's
UNIX PC	IBM PC (DOS to XP)	Sun Sparc
IBM 370	iMAC	

OPERATING SYSTEMS:

DL240/440	MVS/SP
DOS OS X (up to 10.3.7)	Windows (3.1, 95, 98, NT, Win2K, XP)
MVS/JES2	UNIX System V
VOS	



LANGUAGES AND PACKAGES:

APL	JAVA	Oracle8
Apache & TomCat	JCL	RLLPlus
Brief	Ladder Logic	SAS
C	Lotus 1-2-3	Script
Claritas Connect and MAX3D (NDPC access)	Microsoft Access	SPSS
DBASE III + IV	Microsoft Word	Stratus FMS
Emacs	Network Express (NETX)	SQL
FORTRAN	Perl	TCP/IP
HTML	PL/I	Visual BASIC
JAM	Python	VS BASIC
	QuattroPro	WordPerfect

Employment History

2003 – Present	Chief Technology Officer	Health Resources Alliance, Oak Brook, IL
1996 – Present	Founder, President	Gerontological Solutions, Inc., Deerfield, MA
1994 - 2002	Consultant	Fidelity Investments, Boston, MA
1993 – Present	VP, Systems & Technologies	Gerontological Services, Inc., Santa Monica, CA
1995 - 1995	VP, Software Development	Griffin Systems, Shutesbury, MA
1990 - 1993	Sr. Consultant/System Architect	Windsor Systems, Chatsworth, CA
1984 - 1989	Sr. Software Developer	Advantage Systems, Waltham, MA
1982 - 1984	Programmer/Consultant	University of Southern California, L.A., CA

Education

Hampshire College, Amherst, Massachusetts, Bachelor of Arts, Sociology
University of Massachusetts, Amherst, Massachusetts, Post Graduate Studies
Northeastern University, Burlington, Massachusetts, Post Graduate Studies

Presentations

“Strategic Technology Planning: Principles, Process, Outcomes”, California Association of Homes and Services for the Aging Annual Meeting, May 2005.

“Technology: Ready or Not, Here It Comes!” Life Services Network Annual Meeting, April 2005

“Technology in Aging: Real Applications for Real People”, American Association of Homes and Services for the Aging Annual Meeting, 2004.

“Life-Assisting Information Systems: Enhancing the Senior Living Environment”, Life Services Network Annual Meeting, 2004

“Power to the People”, American Association of Homes and Services for the Aging. Annual Meeting, 2003.

Pre conference seminar, **“Tech: Changing the Model... Changing the Tools”** International Association of Homes and Services for the Aging, Sydney Australia, June 2003



Endnote speaker, *“Managing From the Future”* a leadership summit on the future of aging in Kansas, April 2002

General Session speaker, *“Creating a Mosaic of Aging: Our Community Emerges”* 24th Annual Conference, Southwest Society on Aging and Mid-America Congress on Aging, Nov. 2002

Forces of Change in Retirement Housing Design. Harvard University, Graduate School of Design, 1998, 1999, 2000, 2001, 2002.

Keynote speaker, “Senior Living in the Age of the Internet” symposium sponsored by ElderVision & Carnegie Mellon University, June, 2000

“Women Entrepreneurs in Technology, A Case Study”. Hampshire College, Lemelson National Program for Invention, Innovation and Creativity, 1998.

“Technology in Your Problem Solving Equation”. California Association of Homes and Services for the Aging, State Association Meeting, 1998.

“Technologies Applied: The Good News. Case Studies” American Association of Homes and Services for the Aging. Annual Meeting, 1997.

“When is Technology Part of the Solution & Not Part of the Problem?” American Association of Homes and Services for the Aging. Annual Meeting, 1996.

Patents and Intellectual Property

Patent-pending- *“Intentional Community Management System”* applied for in January 2003
US005905436- *“Situation-based Monitoring System”* issued May 18, 1999

Professional and Community Memberships

Center for Aging Services Technology (CAST- AAHSA) charter participant
Deerfield, MA Senior Housing Committee, Chair
Community Advisory Board member for Rural Development, Incorporated
Board member of Four Winds School in Gill, MA
“Managing From the Future ” technology specialist
Food Bank & Food Bank Farm of Western Massachusetts
Loomis Communities, Board member, Incorporators
National Association of Female Executives
National Museum of Women in the Arts, Charter Member



HAROLD N. URMAN, *Statistical Analyst*

Professional Experience

- 1984 - : Consulting Statistical Analyst, Gerontological Services, Inc.
1982 - : Partner, Vital Research, Los Angeles, CA
1982 - 1984: Adjunct Professor, USC Department of Education Psychology, Los Angeles CA
1982 - 1984: Senior Programmer/Consultant, University Computing Center USC,
Los Angeles, CA
1980 - 1984: Research and Statistical Consultant, Los Angeles, CA
1981 - 1982: Research Consultant, Research Assistant, University of Southern California,
Los Angeles, CA
1981: Research Assistant, California Institute of Technology. Teaching Assistant, USC, Los
Angeles, CA
1980: Psychometrist, Legal Psychology and Psychiatry Center
1978 - 1980: Intern Therapist, Foundation for the Rechanneling of Emotions and Education, Los
Angeles, CA
1976 - 1977: Research Assistant, UCLA Psychology Department, Los Angeles, CA

Education

University of Southern California, Doctorate of Philosophy, Education Psychology
California State University, Master of Arts, Psychology
University of California, Los Angeles, Bachelor of Arts, Psychology

Professional Memberships

American Marketing Association
American Psychological Association
American Educational Research Association
National Counsel on Measurement in Education
Aerobics & Fitness Association of America, Board of Trustees

Awards

Phi Delta Kappa, Educational Honorary Society
USC Educare Scholarship
Education Alumni Association Award
USC Honorary Award



Publications and Presentations

"Incentives Raise Questions as well as Response Rates". Dwight, Maria B. and Urman, Harold N., Marketing News, March 29, 1985: Vol. 19 No. 7

"Affluent Elderly is a Unique Segment". Dwight Maria B., and Urman, Harold N., Marketing News. August 16, 1985: Vol. 19 No. 17

"Development of an Incontinence Monitoring Record". The Gerontologist, 1984, 24, 212-213 by Ouslander, J.G., Urman, G.C. and Urman, Harold N.

"Development and Testing of an Incontinence Monitoring Record". Paper presented at the Annual Meeting of the Gerontological Society of America, San Antonio, TX: Nov. 1984: by Ouslander, J.G., Urman, G.C., and Urman, Harold N.

"Measuring the Effectiveness of Behavior Science Orientations in Family Practice." Paper presented at the Annual Meeting of the Society of Teachers of Family Medicine, Chicago IL: May 1982. By Walker, B., and Urman, H.

"Clinical Factors Associated with Incontinence in Nursing Home Patients". Paper presented at the Annual Meeting of the Western Gerontological Society, Denver, CO: May 1984. Urman, G.C., Ouslander, J.G. and Urman, H.N.

"Test-Taking Attributes in White, Black and Hispanic Students." Paper presented at the Annual Convention of America Psychological Association, Los Angeles, CA: 1983. Benson, J., Urman, H.N. & Hocevar, D.

"The Effects of Test-Wiseness Training on the Achievement of Minority Students". Paper presented at the Annual Convention of the National Counsel on Measurement in Education, Montreal, Canada: April 1983.

"Visual Distinctive Features Families - Choice Reaction Time Analysis". Paper presented at the Annual Convention of the American Psychological Association, August 1982. By Briggs, R., Hocevar, D. and Urman, H.N.

"The Effects of Variations in Instructions and Scoring Criteria on the Measurement of Original Thinking". Paper presented at the Annual Convention of the American Educational Research Association, March 1982. By Urman, H.N., Adler, P., & Hocevar, D.

The impact of quality of life improvement in skilled nursing facilities, October, 1999. Co-presented with Gwen Uman at American Health Care Association 49th Annual Convention and Exhibition, New Orleans, LA.

The value of measuring satisfaction in long-term care, November, 1998. Paper presented at American Association of Homes and Services for the Aging, 37th Annual Meeting, Los Angeles, CA.

[in press] Uman, G.C., Hocevar, D., Urman, H.N., Young, R., Hirsch, M. & Koshler, S. Satisfaction Surveys with the Cognitively Impaired (Chapter 9) in J. Cohen-Mansfield, Ejaz, F.K., Werner P. (Eds.) Satisfaction Surveys in Long Term Care. Springer Publishing Co.



GWEN C. UMAN, *Geriatric Nurse Practitioner*

Professional Experience

- 1983 - : Consultant, Gerontological Services, Inc.
1982 - : Partner, Vital Research, Los Angeles, CA
1991 - : Assistant Professor, Department of Nursing, California State University,
Los Angeles, CA
1991 - 1992: Lecturer, UCLA Business Management Program, Los Angeles, CA
1991 - 1992: Assistant Professor, California School of Professional Psychology, Alhambra, CA
1985 - 1990: Visiting Lecturer:
School of Nursing, University California Los Angeles
School of Education, University of Southern California
1982 - 1990: Research Assistant; School of Medicine, University of Southern California
1982: Instructor, Leonard Davis School, Andrus Gerontology Center, University of Southern
California, Los Angeles, CA
1980 - 1982: Health Services Consultant, Jewish Family Service Multi-purpose Senior Service Project
(MSSP), Los Angeles, CA
1978 - 1980: Gerontological Nurse Practitioner, Meals for Millions/Freedom From Hunger
Foundation, Santa Monica, CA
1975 - 1979: Assistant Clinical Professor, School of Nursing, University California Los Angeles, Los
Angeles, CA
1973 - 1975: Instructor, School of Nursing, University of Wisconsin-Madison, Madison, WI
1971 - 1972: Community Nursing Coordinator, Los Angeles County/USC, Medical Center, Los
Angeles, CA
1969 - 1971: Liaison Nurse, Cedars/Sinai Medical Center, Los Angeles, CA

Education

University of Southern California, Doctorate of Philosophy
University of California Los Angeles, Master of Nursing, Primary Ambulatory Care
University of California Los Angeles, Bachelor of Science, Nursing
Higher and Post-secondary Education, Educational Psychology, Research Methods and Statistics

Licensure

Registered Nurse, Nurse Practitioner - California # 182986

Board Certification

ANA: Gerontological Nurse Practitioner



Gerontological Services, Inc.

1237A Third Street Promenade Santa Monica, California 90401-1307 (310) 393-0332 FAX: (310) 393-1332

Professional Activities

Nursing Research Study Section, Division of Research Grants, National Institutes of Health, Bethesda, MD.

Member, American Nurses' Association--Council of Primary Health Care Practitioners, Council of Nurse Researchers, Gerontological Nursing Council.

California Nurses' Association- Region 6 Secretary (1986-1988). Public Relations Committee Chair (1986-Present). Cooperating Committee Co-Chair for International Nursing Research Conference (1992).

Alumni Association, School of Nursing, UCLA, Los Angeles, CA - Treasurer (1978-1980).

Volunteer Gerontological Nurse Practitioner, Senior Health and Peer Counseling Center, Santa Monica, CA

Sigma Theta Tau, Gamma Tau Chapter, Los Angeles, CA

American Educational Research Association, Professional Education and Post-secondary Education Divisions.

Gerontological Society of America, Clinical Medicine Section

Member, Board of Directors, Senior Health and Peer Counseling Center, Santa Monica, CA.

Awards and Honors

Sigma Theta Tau, Nursing Honorary Society

Phi Delta Kappa, Honorary Education Society

Educare Scholar, USC School of Education

Jean Sullivan Award, California Nurses' Assoc.

Leadership Award, Sigma Theta Tau, Gamma Tau Chapter

Lectures and Presentations

Unintended outcomes of arthritis self-help course, April, 1986. Paper presented at the meeting of the American Educational Research Association, San Francisco, CA.

Self-care and family education, September, 1988. Workshop presented at Hospital Discharge Planning for the Elderly; Decisions, Dilemmas and Directions for the Future Conference, Los Angeles, CA.

The challenge of growing old: Does the health care team help. January 1989. Keynote address at Geriatrics in a Changing Society Conference, Phoenix, AZ.

Challenges of Gerontological Nursing Research, October 1989. Speech presented at National Gerontological Nursing Association Annual Educational Conference, Anaheim, CA.

Believing in the resident, October, 1998: The consequences of measuring resident satisfaction in long-term care. Paper presented as Distinguished lecturer at Kansas State University, Center for Aging, Manhattan, KS.

Measuring resident satisfaction in long-term care: value and consequences, October, 1998: Presented at the American Dieticians' Association 81st Annual Meeting and Exhibition, Creating the future:



Partnering with the public, Kansas City, MO. The value of measuring satisfaction in long-term care, November, 1998. Session moderated at American Association of Homes and Services for the Aging, 37th Annual Meeting, Los Angeles, CA.

The impact of quality of life improvement in skilled nursing facilities, October, 1999. Co-presented with Harold Urman at American Health Care Association 49th Annual Convention and Exhibition, New Orleans, LA.

Publications

Uman, G.C. (1979). Pre-retirement health planning. In Clinical and Scientific Sessions. American Nurses' Association.

Uman, G.C. and Hazzard, M. (1982). Lifestyle change in elderly hypertensive persons -- A multifaceted treatment program. Aging and Health Promotion. Rockville, MD: Aspen Systems Corporation.

Chang, B.L., Uman, G.C., Linn, L.S., Ware, J.E., & Kane, R.L. (1985). Adherence to health care regimens among elderly women. Nursing Research. 34 (1), 27-32.

Ouslander, J.G., Uman, G.C., & Urman, H.N. (1986). Incontinence among nursing home patients: Clinical and functional correlates. Journal of Gerontology.

Falskerud, J.H., Uman, G.C., (1993). Directions for AIDS Education for Hispanic Women Based on Analysis of Survey Findings. Public Health Reports. 108 (3), 298-304.

Warner-Reitz, A., Uman, G.C., & Magit, J. (1981). Health monitoring component. In Warner-Reitz (Ed.), Healthy lifestyles for seniors. New York: Meals for Millions/Freedom from Hunger Foundation.

Urman, H.N., & Uman, G. C. (1985). Computers, software only as smart as programmer. Marketing News.

Urman, H.N. & Uman, G.C. (1990). Beyond Crosstabs: How valid is valid? California Marketing.

Urman, H.N. & Uman, G.C. (1990). Beyond Crosstabs: Where would your survey be without reliability? California Marketing.

Urman, H.N. & Uman, G.C. (1990). Beyond Crosstabs: The uses and abuses of statistical computer programs. California Marketing.

[in press] Uman, G.C., Hocevar, D., Urman, H.N., Young, R., Hirsch, M. & Koshler, S. Satisfaction Surveys with the Cognitively Impaired (Chapter 9) in J. Cohen-Mansfield, Ejaz, F.K., Werner P. (Eds.) Satisfaction Surveys in Long Term Care. Springer Publishing Co.



WILLIAM D. HENDRICKSON, *Financial Consultant*

Description of the Firm

Hendrickson Consulting (HC) is a financial and management consulting firm specializing in non-profit retirement organizations. The firm was founded in 1989 by William D. Hendrickson. Since then, HC has completed more than 200 assignments for retirement communities, educational organizations, hospitals, and other non-profit organizations. HC specializes in feasibility studies, project development and business strategies, and tax-exempt financing evaluation and restructuring. HC has completed feasibility studies for more than 50 tax-exempt bond issues, ranging in size from \$2 million to \$100 million. HC has also completed dozens of assignments for clients requiring financial planning and evaluation.

William D. Hendrickson

William D. Hendrickson is the president of Hendrickson Consulting. Previous to forming the firm, he held positions with financial advisory and consulting firms. Mr. Hendrickson received his BA from the University of California at Berkeley and his MBA in Finance from the University of Washington. He is a member of the American Association of Homes and Services for the Aging (AAHSA) and other industry associations.

Professional Experience

1989 - : Financial Consultant, Gerontological Services, Inc., Santa Monica, CA
1989 - : President, Hendrickson Consulting, Berkeley, CA
1987 - 1989: Senior Associate, Economic and Planning Systems, Inc., Berkeley, CA
1982 - 1989: Project Manager, Bartle Wells, Inc., San Francisco, CA
1977 - 1979: Analyst, Arthur D. Little, Inc., San Francisco, CA

Education

University of California, Bachelor of Arts, Urban Studies
University of Washington, Masters in Business Administration, Finance

Professional Memberships

American Association of Homes and Services for the Aging
California Association of Homes and Services for the Aging
American Hospital Association



Project Experience

Retirement Communities and Long-Term Care Facilities:

Atherton Baptist Homes, Atherton, CA
California Lutheran Homes, Alhambra, CA
California State Department of Social Services, Sacramento, CA
Carlsbad by the Sea, Carlsbad, CA
Foundation to Assist California Teachers, Los Angeles, CA
Hillcrest Homes, La Verne, CA
Mary's Woods at Marylhurst, Lake Oswego, OR
Merle West Corporations, Klamath Falls, OR
Salem Lutheran Home, Oakland, CA
Solvang Lutheran Home Solvang, CA
Southern California Presbyterian Homes, Glendale, CA
Sunnyview Lutheran Home, Cupertino, CA
Sunset Haven, Upland, CA
Veterans Home, State of California
Villa Siena, Mountain View, CA

Hospitals and Hospital Diversification:

Greater Bakersfield Memorial Hospital, Bakersfield, CA
Redbud Community Hospital, Clearlake, CA
Santa Clara Valley Medical Center, Santa Clara, CA
St. Joseph's HealthCare Corporation, Stockton, CA
Valley Memorial Hospital, Livermore, CA

Medical Clinics:

Santa Barbara Medical Foundations, Santa Barbara, CA
Gould Medical Foundation, Modesto, CA

Partial Client List

Southern California Presbyterian Homes
American Baptist Homes of the West
Casa Dorinda
Channing House
Solvang Lutheran Home
Foundation to Assist California Teachers
Heritage Pointe
Sunset Haven
Salem Home
California Lutheran Homes
Sunnyview Lutheran Home
Atherton Baptist Homes



The Meadows of Moline
California State Department of Social Services
California Association of Homes and Services for the Aging
Northern California Presbyterian Homes and Services
Friends House
Hillcrest Homes
California-Nevada Methodist Homes
Eskaton
Crestwood Hospitals
Pacific Lifecare
Missionary Sisters of the Sacred Heart
The Meadows of Napa Valley
West Marin Senior Services
Webster House
St. Joseph Health System
Merle West Medical Center
Health Dimensions, Inc.
Sisters of the Holy Names of Jesus and Mary
Sierra Village
Seniority, Inc.
Classis Residences by Hyatt
Episcopal Home
Masonic Homes of California
Rockwood Retirement Community
The Kenney

