

Maximizing Value: Affiliations and Partnerships in Senior Living

From Sunset Communities to Otterbein Sunset A Case Study

Overview

Aspire Consulting Partners, Inc, an advisory firm that partners with leaders and organizations so they can thrive while positively impacting the world, was engaged by Sunset Retirement Communities' Board of Directors in 2019 to lead them through a process that would sustain the organization's mission for years to come. The culmination of this process occurred in 2020 when Sunset affiliated with Otterbein SeniorLife, a win for both Senior Living organizations.

The following case study reflects Aspire's customized process to ensure client priorities are achieved and their mission is preserved when affiliating with another organization. This particular affiliation was completed in 12 months, a time span well below the average partnership process.

Senior Living Sector – *The Landscape*

Across the country Senior Living providers are exploring and experiencing new and unique affiliations, partnerships, and collaborative synergies. This demand is driven by pressures to reduce costs of care delivery, achieve economies of scale, and build connective platforms that increase innovation and widen access to services. The market disruption in Senior Living, together with changes in consumer demands due to market demographics, baby boomers and access to affordable housing with healthcare services, requires that boards and senior leadership have generative discussions to (1) assess their organization's current positions and (2) chart new and smarter pathways forward. Such was the case specifically for Sunset Communities.

Sunset Communities – The Challenge

Sunset Communities (www.sunset-communities.org) is an Ohio-based senior care non-profit organization providing a wide array of services for seniors in northwest Ohio and southeast Michigan. The organization has been fulfilling its mission of “enriching individual life’s journeys” since 1871. Currently, Sunset Communities offers independent living, assisted living, memory-support, health care, hospice, and palliative care throughout its locations.

Sunset Communities and Aspire Consulting Partners, Inc. – The Solution

Aspire was initially engaged to design and facilitate Sunset’s employee engagement strategy. During this engagement, Sunset realized the breadth of Aspire’s capabilities and its own need to create its strategic plan, expertise for which Aspire is known.

As it does with all its clients, Aspire began its work with a customized discovery process. Through conversations with key business partners and community stakeholders, the board engagement survey, and a review of published sector materials, Aspire identified a central theme: long-term sustainability. Specifically, how would Sunset position itself in order to preserve its historic mission as a high-quality, non-profit, community focused Senior Living provider?

Using the results of Aspire’s research, during the summer of 2019, the Sunset Chief Executive Officer, Board of Directors, and Board Executive Strategy Committee determined the best course of action was to affiliate or partner with another like-minded provider to meet this goal. Factors influencing the Board’s decision included the increasingly challenging operating environment, a realization of sector trends for affiliation with other organizations, and a belief that the current Sunset reputation and resources would allow the Board to exercise choice related to potential partners or affiliating entities.

The Sunset Board identified its own priorities for affiliation or partnership opportunities which included mission/values alignment, financial performance of the outside entity, and the preservation of the Sunset endowment for need-based recipients. The Sunset Communities Board engaged Aspire to continue its work toward realizing a full operating affiliation or partnership in 2020 with a like-minded Senior Living provider.



Aspire’s process that results in an affiliation includes the following:

- Establish and execute to an agreed upon phased timeline with clear deliverables and milestones.
- Establish and support a comprehensive communication plan including talking points, noticing documents and coordination, hotline, and media/public relations efforts.
- Create a market profile and organizational pitchbook.
- Explore, source, and vet potential partner organizations.
- Construct and apply candidate scorecards to narrow the field.
- Provide ongoing support and industry insights to the Board Strategy Committee.
- Create and manage virtual data site to serve as a clearinghouse for diligence efforts.
- Facilitate introductions, tours, and other efforts to familiarize the Sunset leadership and Board members with final candidates’ leadership teams and Board members.
- Conduct diligence services and provide decision-making frameworks so the Board could confidently select their preferred partner.
- Advise on potential critical issues to the integration process.
- Oversight of organizational integration process.
- Final organizational launch, announcement oversight, and process evaluation.

“We are extremely grateful for Aspire’s tremendous consulting guidance, leadership, direction, and hands-on swift and responsive management. It was spot-on for our organization’s needs and priorities. Because of Aspire’s hard work, we now have a number of advantages for future growth and success.”

--Vicky Bartlett, Sunset Communities CEO and President

Sunset Communities and Otterbein SeniorLife – The Results

After research and due diligence, the Sunset Communities’ Board narrowed the potential affiliate partners that Aspire identified and evaluated the finalists. On August 12, 2020, just 12 months after the process began, Sunset announced its affiliation with Otterbein SeniorLife (www.otterbein.org), a senior care non-profit organization based in Lebanon, Ohio.



As Vicky Bartlett, Sunset's CEO and President, stated:

“Our Board has been looking for the best way to assure the long-term viability of our Community, and this is it. Otterbein SeniorLife is clearly one of the premier senior care providers in the nation, and aligns best with us culturally and philosophically.”

The motto of the new blended organization is **Together – We Are Stronger!**

About Aspire Consulting Partners, Inc.

Since our founding in 2011, Aspire Consulting Partners, Inc. continues to live out our mission of helping individuals and organizations become *all they aspire to be*. Aspire is no stranger to Senior Living. At Aspire, our leadership history represents over 100 years of knowledge within Senior Living, education, and social enterprises. More specifically, many of our team members have held senior management positions within Senior Living companies, both not-for-profit and for-profit, which truly allows us to understand the specific needs and nuances of Senior Living organizations and those who lead them.

Whether you are thinking of affiliations or partnerships, internal organizational changes, or day-to-day survival, Aspire Consulting Partners, Inc. makes things happen. Our services include:

- Partnerships & Affiliations
- Organizational Performance Improvement
- Strategic Planning
- Board Engagement & Development
- Leadership Development & Succession Planning
- Employee Engagement & Culture Building
- Executive Coaching
- Employee Well-Being Strategy & Coaching

To learn more about the Aspire Consulting Partners philosophy, leadership team, and commitment to integrity and service, contact us at (847)964-1739 or visit our website at www.aspireleadwell.com.

