



FREQUENTLY ASKED QUESTIONS

Q1: Why is Heritage on the Marina exploring changes to its campus and its operations?

A1: We have anticipated and provided for our residents' evolving needs throughout our 168 years. Current and future residents prefer to receive care in the comfort, security and privacy of their homes. To support this trend, Heritage on the Marina leadership decided to explore how to update the campus, its operations and create a sustainable path - a process we expect to take about a year.

Q2: What type of changes are being considered for Heritage on the Marina?

A2: A number of ideas will be explored to support an at-home care model and make Heritage on the Marina operations sustainable, including ways to increase revenue through better use of campus space, the potential closing of the Health Center, remodeling and increasing the number of residential homes, increased parking facilities and improving community spaces. We expect it to take more than a year to determine what best achieves the balance of the at-home care model and operational sustainability.

Q3: What impact might changes that Heritage on the Marina decides to undertake have on me?

A3: We don't know yet until we determine what changes to make, if any. Given the potential for construction, however, it's fair to anticipate disruption to current campus routines. Our exploration of what changes to consider includes how to minimize any impact on current residents and employees

Q4: Will I have to move out of my home and/or Heritage on the Marina during any of these changes?

A4: We don't know yet until we determine what changes to make, if any. Given the potential for construction, however, it's fair to anticipate disruption to individual homes and routines. Our exploration of what changes to consider includes how to minimize any impact on current residents and employees. Any potential construction wouldn't begin until 2026 at the earliest.

Q5: Will employees lose their jobs?

A5: We don't know yet until we determine what changes to make, if any. We anticipate that changes to support at-home care will include new responsibilities from our employees. Our exploration of what changes to consider includes how to minimize the impact on current employees and the potential for re-training to meet new service needs.

Q6: When will Heritage on the Marina know what changes it will make?



A6: We anticipate the exploration process to take about a year as we consider how to meet residents' increasing desire for at-home care balanced with Heritage on the Marina's sustainability.

Q7: Will Heritage on the Marina increase my costs as a result of any changes?

A7: No. We are unwavering in our commitment to provide the high-quality care current residents expect and to fulfill all of our contractual obligations.

Q8: Will Heritage on the Marina cover all costs should I need to move during construction?

A8: Yes. We are unwavering in our commitment to provide the care our residents expect from us under all circumstances. Be assured that Heritage on the Marina will do the right thing for our residents.

Q9: Will residents and employees have a voice in what ideas are considered and, potentially, implemented?

A9: Yes. Ensuring that we are meeting the needs of current and future residents is the catalyst for considering changes as we focus on strengthening our at-home care model. We'll need to balance any potential changes with Heritage on the Marina's sustainability. Ultimately, the decision for any changes will be made by the CEO and the Board of Directors, which includes several resident members.

Q10: How will Heritage on the Marina keep me informed about the exploration process?

A10: It's important that residents and employees are active participants as we consider what to change. We plan to provide regular updates, communications and forums for discussion about this exploration process.

Q11: How will I be cared for if the Health Center is closed?

A11: Should we decide to close our Health Center, it will allow Heritage on the Marina to focus more on providing high-quality care for our residents in the comfort of their own homes. Our residents will continue to receive all their care and services outlined in their contracts and for their needs. Residents currently admitted to the Health Center will be cared for until their care is complete or until we are able to transfer them to an equitable facility.

Q12: So, it's possible for residents in need of Health Center care would have to move?

A12: We're considering a goal that has residents receiving Health Center care in their individual homes, where they are most comfortable, secure and private. Should a resident require more care than Heritage can provide, we will work with them and their family to provide the care they need, which is our current practice.

Q13: Is Heritage on the Marina under financial distress?



A13: No, but our ability to sustain current expenses without addressing our care model to meet current and future resident needs is not sustainable long-term. This is why we are exploring how to align with resident needs and assure that Heritage on the Marina is a strong financial steward for the long-term.

Q14: Could these potential changes have been prevented?

A14: No. The evolving needs of healthcare and the sustainability of funding for Heritage on the Marina operating expenses from long-term investment resources necessitated this exploration for the future. The rising costs of healthcare and residential living have created a greater impact on our investments that, unless addressed, will impact our long-term sustainability.

Q15: Where may I get further information?

A15: To learn more, please contact CEO Mary Linde at mlinde@heritagesf.org.