



Being Home At Heritage

Main Narrative

Top line

Heritage on the Marina is home for people living secure and healthy lives at their own pace in their own space. Residents live the way that is most comfortable for them, engaging with our supportive services as they need. Throughout our 168 years, Heritage on the Marina has anticipated and provided for our residents' evolving needs, which is why we now are exploring how best to prepare for a sustainable future.

Supporting Pillars

Heritage on the Marina is home for people living secure and healthy lives at their own pace in their own space.

- Nothing is more important for people than a place to call home that reflects who they are and provides them with comfort, security, privacy and dignity.
- Being Home at Heritage means residents live how they want, engage with supportive services as they need and are in control of their life's journey.
- Current and future residents are asking for their care – no matter its level – to be provided in a comfortable, secure and private space – their home.
- Our residents select from Heritage on the Marina's full range of supportive services to meet their care needs delivered in the privacy of their home.

Increasingly, individuals prefer to receive healthcare services at home, a trend that is changing how Heritage on the Marina provides its range of long-term care services.

- Current and future residents are requesting that their healthcare be provided in the comfort, security and privacy of their home whether it's minimal or long-term.
- The global COVID-19 pandemic accelerated this trend as at-home care was mandated and preferred.
- Individual control of the environment in which their healthcare is provided increasingly is tied to improved well-being, faster recovery and desired privacy.
- While Heritage on the Marina is proud of the quality of care our on-campus Health Center provides, we realize we must consider how to meet the changing care needs and desires of current and future residents.

Heritage on the Marina has anticipated and provided for our residents' evolving needs for 168 years, which is why we now are exploring how best to prepare for a sustainable future.

- Heritage on the Marina leadership began discussing in early 2021 how to support residents' desires for at-home care and how feasibly to update the campus and make its operations sustainable.
- Our Board of Directors approved in August 2021 the development of a strategic plan to explore an at-home model of care, including potential facility and operational changes to meet residents' increased requests for at-home care and to be financially sustainable for Heritage on the Marina.



- We engaged an experienced Bay Area consultant, Rockwood Pacific, to manage this project, working closely with CEO Mary Linde and her team.
- 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 are exploring these possibilities to ensure we are preparing for the needs of our current and future residents
- Nothing has been decided as we expect the exploration process to take more than a year to determine what best achieves the balance of the at-home care model and operational sustainability.

Throughout this process and any potential changes it may deliver, Heritage on the Marina is committed to fulfilling all of our commitments to current residents, ensuring their long-term care needs are met.

- We are unwavering in our commitment to provide the high-quality care each resident expects and to fulfill all of our contractual obligations.
- Should a current Life Care contract resident require care that exceeds our medical capabilities, we will work closely with them and their families to fulfill their needs, a commitment we make for all of our residents.
- These residents will not pay any additional fees outside of their current contracts for these services.

CONSIDER THE FOLLOWING PILLAR ONLY FOR LIMITED AUDIENCE(S)

Heritage on the Marina's Health Center operations have struggled to find effective solutions that allow it to function without an operating loss and meet the increasing request for at-home care.

- Heritage on the Marina can't provide high-quality care to our residents if we aren't financially sustainable.
- We have used endowment funds to support Heritage on the Marina's operational costs that have grown for reasons beyond our control:
 - Residents' desires for receiving services at home have been accelerated by the COVID-19 pandemic.
 - Strong competition by nearby hospitals and health systems make it difficult to acquire sufficient admissions to our Health Center and to staff it at appropriate levels
 - Intense San Francisco commute obstacles and the high cost of living make it difficult to recruit and retain staff for the Health Center.
- Closing the Health Center will allow Heritage on the Marina to decrease our operating losses and continue to be good financial stewards of our business, which in turn will allow us to provide the care and amenities residents expect from us.