

**SENIOR LIVING MARKET FEASIBILITY STUDY  
FOR  
HAYSVILLE, KANSAS**

**Prepared by:**



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E. *Largest Nursing Home Facilities*, by Stephani Bloyd, Wichita Business Journal, September 15, 2017.

F. *"The Five-Year Senior Housing Development Forecast"* by Senior Housing News.

## EXECUTIVE SUMMARY

Johnson & Associates (J&A) and its Senior Vice President, Melissa Woodall, were retained by the City of Haysville to conduct a *Senior Living Market Feasibility Study* in May of 2018. The purpose of the study was twofold: first determine if there was a need for additional senior housing in Haysville; and, if so, what type of product would be supported. After conducting onsite research during June of 2018 as well as obtaining research from secondary sources within the Wichita marketplace and through national sources, we at J&A are confident with the findings contained within this report.

The answer to the first question posed as to whether there is a need for additional senior housing in Haysville is an unequivocal yes. There are four senior housing options that currently exist in Haysville and all are full as of the time of this study with waiting lists ranging from three (3) to eighteen (18) months. These waiting lists reflect those individuals that have already made the decision to downsize and/or move to an assisted living or nursing care facility. When surveyed, the existing facilities reported that the vast majority of their residents are in fact not from Haysville but are from Wichita or other communities. There are several reasons for this but the most obvious one is that currently all but one of the senior facilities in Haysville are income based rather than market based. Thus, residents of Haysville and the surrounding area who can afford market rate are locating elsewhere in the greater Wichita market. Alternatively, residents are electing to stay in their home with family assisting in their needs because senior housing options with the desired amenities do not exist in Haysville.

The second part of our assignment was to determine what type of product would be supported if we found that additional senior housing options were needed. Having found that the demand was present, we then surveyed the marketplace as well as the industry as a whole to understand what type of product offerings were available. We also surveyed Haysville seniors to understand what their needs and preferences were. It is important to note that during our research, the concepts of the 'Graying of America' and 'Aging in Place' quickly surfaced. While the 'Baby Boomer' generation begins to enter their senior years (referred to as the graying process), we as a Nation (and for the purposes of the study, on a more local and regional basis), are confronted with providing services to this rapidly expanding senior population. The aging in place concept has become a strong preference of the local seniors who did not want to move multiple times once the decision to downsize to an independent or assisted living community was made. They liked the idea of the idea of aging in place within a senior community.

We found that while there had been significant new investments in senior housing developments (primarily assisted living facilities) during the last ten years in the region, these developments had been constructed primarily in Wichita as well as in communities to the north and east of the Wichita Metropolitan Statistical Area (MSA). There had been almost no new construction to the south and west of the Wichita MSA of which Haysville is included. As such, we believe that this void in the south and western portion of the Wichita market offers an opportunity for the right developer and operator to capitalize on the untapped and underserved Haysville market as well as the southern and western portions of the Wichita MSA.

We held numerous formal and informal focus group visits and meetings with local seniors, officials and business leaders. Following these visits, we are confident that Haysville and the surrounding market will support a transitional senior living community. This community could offer independent and assisted living options as well as short- and long-term nursing care, memory care and hospice care services. Additionally, we believe that the market will support a small number of patio homes for seniors adjacent to the transitional senior living community that is noted above. These homes are envisioned to be 1,200 sq. for those seniors who wish to downsize but remain completely independent and do so in close proximity to the transitional senior living community.

The City's commitment to meeting the needs of its senior population also provides it with an economic development opportunity. We believe that the Haysville market is currently at capacity with income based senior housing. As such, this new transitional senior living community may be a for-profit entity that will charge market rates for amenities. Additionally, the owner and operator would be contributing to the local taxing jurisdictions in the form of property, school, county, and other taxes. Moreover, the jobs that are associated with operating the proposed transitional senior living community are varied and skilled. These employees will provide direct and indirect tax revenues to the City in addition to the overall economic benefit derived from relocations associated with employment at the new community.

Finally, it bears repeating that the void that currently exists within the southern and western areas of the Wichita MSA provides an investor and developer with a tremendous opportunity. The City of Haysville has not only invested in this study to determine if in fact the market is present to support a development such as is proposed (it clearly is), but they have identified a proposed site and are willing to offer that site to the selected developer and operator to support its efforts to realize the community's desire of attaining excellent senior housing and amenities. The long-term partnership between the City and all parties committed to the success of transitional senior housing and senior patio homes in Haysville will be a positive outcome.

# 1. INTRODUCTION

In April of 2018, the City of Haysville, Kansas solicited Requests for Proposals from Economic Development and Real Estate Consulting Firms to complete a Senior Housing Market Feasibility Study for Haysville. In May of 2018, the City of Haysville awarded that contract to Ms. Melissa Woodall, Senior Vice President, an Independent Contractor of Johnson & Associates (J&A) of Austin, Texas. Ms. Woodall has over 24 years of professional economic development management experience in the states of Texas and Arizona and has served as Senior Vice President of J&A for four years providing economic and community development consulting services to clients throughout the country.

The feasibility study was formally launched the week of June 11, 2018 when we traveled to Haysville for one week. During that week, numerous meetings were held with elected officials, City staff, business and community leaders, existing senior living providers, regional planners, and focus groups that included the Haysville Senior Center Advisory Board and others. These meetings provided us opportunities to solicit input and feedback from residents on the need for additional senior housing as well as the type of product, if desired. Additionally, during the week-long visit to Haysville, we toured the region visiting several existing senior living communities within the marketplace. These facilities included free standing independent living facilities, assisted living facilities, and nursing homes. It was important to gauge the marketplace while also understanding the products and services that were available within the Wichita Metropolitan Statistical Area (MSA), in which the Haysville community falls.

It is the professional opinion of this Economic Developer that while a significant number of facilities designed to provide for the needs of the aging population exist within the Wichita MSA, there is an obvious absence of the same in southern and southwestern portions of the Wichita MSA. Haysville is in the center of this void. Based upon the market research that was conducted on and off site as well as the above-mentioned meetings, a significant gap was found within the marketplace for senior housing. We also identified a significant amount of desire for senior living communities in Haysville. As such, we have determined that there is a great demand for new senior housing product in Haysville. This report recommends two types of housing products.

We would like to thank the many individuals that participated and contributed to this study. Of course, none of this would have been possible without the visionary leadership of Mayor Armstrong and the City Council who saw the need to invest in this study. Haysville's Economic Developer Zach McHatton was instrumental throughout the process as he served as the project manager for the City and provided us with much needed historical and current information on the community and region. City Administrative Officer Will Black and Planning and Zoning

Administrator Rose Corby were also very helpful. We spent an extended amount of time at the Haysville Senior Center during our week-long visit to Haysville. During that time, we met with Senior Director Kim Landers and Assistant Kristen McDaniel who were both tremendously informative regarding the current needs of the senior population in the Haysville and

surrounding communities. We attended the Panera breakfast where we were able to informally meet and visit with numerous Haysville seniors who provided us with valuable information. Members of the Haysville Police Department were even in attendance for this event and contributed to our informal focus group discussions. Later that week, we had the opportunity to meet with the Senior Citizen's Advisory Board and seek their valuable input on a variety of issues pertinent to this study. We thank the Board for their contributions.

We would like to thank those members of Haysville's business community who took the time to meet with us to better understand the general market conditions in the area and/or the existing senior housing industry in Haysville. Special thanks are extended to Haysville Chamber of Commerce Director Tim Massey and Chamber President Dana Haslett, Brad Bugner of Community Bank, Bret Clark of Valley State Bank, Tom Gibson of Haysville Forward and Mark Eastman of Keller Williams. Terry Bradshaw of Main Street Place, Arien Reeves of Diversicare and Christie McCullough of Peachtree Plaza Tower were each very helpful and forthcoming in providing information relating to their census numbers, etc. There are no doubt individuals whose names are not listed above that we spoke to or met with while in Haysville. Please know that we appreciate the engagement, enthusiasm and willingness to share that everyone that we met exuded.

Finally, we would like to recognize several regional partners that assisted us in our research of the senior population and marketplace within the Haysville and Wichita Metropolitan Statistical Area (MSA). Phil Nelson of the Wichita Area Planning Association, Andrew Nave and Duane Smith of the Greater Wichita Partnership and Amanda Duncan of the Workforce Alliance of Central Kansas each were eager to provide any information that was requested and excited to see the opportunities unfolding in Haysville. Each of these partners stands ready to provide additional assistance moving forward if needed.

Again, we wish to thank Mayor Armstrong and the entire City Council for the opportunity to work with the citizens and businesses of Haysville on such a transformative and meaningful project.

## **2. OVERVIEW OF MARKET FINDINGS**

### **A. MARKET COMPETITON IN REGION**

The Wichita Metropolitan Statistical Area (MSA) has seen a tremendous amount of senior housing development within the last ten years. This development has been primarily in the City of Wichita and within the suburbs to the north and east. These areas have witnessed greater growth and investment than areas to the south and west of Wichita proper.

The market influx of new senior housing development brought new design and developers to the region which was greatly needed. However, the new investments were focused only in the aforementioned areas of the Wichita MSA. At times, the developments were completed without operators secured for Assisted Living facilities. Additionally, occupancy benchmarks were slow to be achieved. This has caused a number of turn-overs in ownership.

While conducting this study, we relied on a variety of methods of research to gain information about senior housing in the Wichita MSA. One of the most useful tools was the Wichita Business Journal who annually releases a list of its 25 Largest Assisted Living Facilities in Wichita as Ranked by Number of Residents, its Top 25 Largest Retirement Communities in Wichita and its Top 25 Largest Nursing Homes in the Wichita Area. Map 1, entitled Top Wichita Area Senior Living Facilities, included at the end of this section reflects the location of these facilities. It is noteworthy that none of the current facilities in Haysville, or the southern and western portions of the Wichita MSA, made the Wichita Business Journal's lists. Additional sources of information included visits to numerous facilities, phone interviews with developers and facility managers as well as third party sources.

It should also be noted that while conducting research for this study, we discovered the concept of Home Plus. This is a relatively new concept in nursing home care that provides memory care, care for patients with Alzheimer's and dementia care. This skilled nursing facility typically only has six (6) to seven (7) patients that are cared for 24/7. A unique aspect of Home Plus is that rather than developing a new facility from ground up, the owner purchases an existing home and retrofits it to accommodate the specific needs of Home Plus and State licensing boards. The fees for services range from \$5,500 to \$6,500/month. Home Plus has a limited but expanding presence in the Wichita market and should be noted when evaluating senior housing options for Haysville.

## **B. EXISTING SENIOR FACILITIES IN HAYSVILLE**

The City of Haysville currently has four senior housing facilities in operation. The largest is **Peachtree Plaza Tower**. This four-story facility was constructed in 1978 and offers sixty (60) Section 8 apartment units for independent living. It should be noted that at the time of this study, all units were leased including two that were leased at a market rate of \$808.00/month. The age limitation of sixty-two (62) and older at this facility is dictated by Medicare/Medicaid. Its close proximity to a grocery store is a great benefit to many residents. Peachtree Plaza is owned by Key Property.



**Peachtree Plaza Tower**

**Diversicare** is a skilled healthcare and rehabilitation center. At the time of our visit to Haysville, the facility had eighty-one (81) Medicaid patients and nine (9) private pay patients. Home & Community Based Services (HCBS Medicare/Medicaid Program) patients pay \$600/month while private pay patients pay \$4,000 - \$6,000/month. The care that is offered ranges from short term rehabilitation to complex medical care to long term care to hospice and respite care. The new administrator is working with the owners of Diversicare to facilitate improvements and upgrades to the facility in the coming years.



Diversicare

The third senior housing option currently available in Haysville is **Main Street Place**. These apartments are conveniently located adjacent to the City of Haysville’s Senior Center. The apartments are age restricted for those fifty-five (55) and older and some units are Section 8. There are a total of ninety (90) one and two bedroom apartments. Some are handicap accessible. Rent rates range from \$400-\$500/month for a one bedroom which includes all utilities.



Main Street Place

The fourth senior living option in Haysville is **Marchant Grove Apartments**. This is the smallest, as well as the newest option in the city. These independent living apartments are conveniently located near the City of Haysville’s Senior Center and other amenities. The sixteen (16) apartment units are built with attached garages. These are the only 100% market-rate priced senior housing product in Haysville. The current rental rate is \$1,800/month inclusive.



**Marchant Grove**

Each of these developments currently has a three to eighteen month waiting list for residents. When surveyed, approximately 3-7% of the total residents in all facilities were Haysville residents. Many of the residents that were not Haysville residents prior to moving into one of the four senior housing developments did so for one of the following reasons:

- They had children or family that live in the area and wanted be closer to them.
- Their health was beginning to decline and they needed to downsize and be closer to family and friends.
- They wanted to return to a smaller community that afforded a more nurturing and friendly environment as opposed to a more urban setting.
- They needed to an affordable care option.

With the significant amount of pent-up demand for space in all facilities in Haysville for the next three (3) to eighteen (18) months, we can logically state that there is tremendous opportunity for new development in the senior housing market in Haysville that can serve the community's residents as well as those residents in the southern and southwestern portion of the Wichita MSA.

**C. DEMOGRAPHICS**

When evaluating market opportunities for new senior housing development in Haysville, it was important to evaluate the demographic trends of the Wichita MSA (that includes Haysville). This evaluation should not only include 2018, but also a forecast of population trends. In order to accomplish this with an accurate and independent perspective, we turned to two sources to

obtain this critical information. Both base their information upon the 2010 Census. The first source is Esri and the second source is Wichita State University's Center for Economic Development and Business Research.

Chart 1 (Demographics) provides data for the City of Haysville and Sedgwick County and in one instance, the US population. The data indicates that between the period of 2010 and 2016, the number of seniors in Haysville (aged 55 and over) increased by 2.1% and during the period from 2016 to 2021, that same population will have grown by 1.8%. The senior population in the entire Wichita market is expected to show similar future trends. In 2014, 25% of the total population was comprised by seniors. Between 2014 and 2019, that number will climb to 27.5%. Similarly, the senior population will grow to 28.6% between 2019-2024, and between 2024-2029, 29.4% of the overall Wichita population is estimated to be comprised of seniors.

What these numbers tell us is that the "Graying of America" trend is alive and well in Sedgwick County and Haysville. And for seniors that are looking for housing and care options close to family and in a safe community, Haysville offers the marketplace a compelling opportunity. Not only is there a growing senior population within the community, there is an existing senior population seeking new housing opportunities. Additionally, recall that Haysville residents make up only 3-7% of the occupants of the four existing senior housing options in Haysville. The rest of the residents are coming from communities within the Wichita MSA.

Chart 2 (Haysville Regional Market Demographics) and the accompanying map under this section documents the total population, household and family population numbers within five (5), ten (10), twenty (20) and thirty (30) miles of Haysville. This information is important in that families are key players in helping senior parents make the decision to downsize and ultimately, where to age in place. Often close proximity to family will be an important factor along with safety, amenities, etc. This chart documents the significant population that is available to a Haysville location within just a ten (10) mile radius of the center of town.

#### **D. MARKET COMPETITON**

The Wichita MSA has seen a tremendous amount of senior housing development within the last ten years. This development has been primarily in the City of Wichita and within the suburbs to the north and east. These areas have witnessed greater growth and investment than areas to the south and west of Wichita proper.

The market influx of new senior housing development brought new design and developers to the region which was greatly needed. However, the new investments were focused only in the aforementioned areas of the Wichita MSA. At times, the developments would be completed

without operators secured for Assisted Living facilities. Additionally, occupancy benchmarks were slow to be achieved. This has caused a number of turn-overs in ownership.

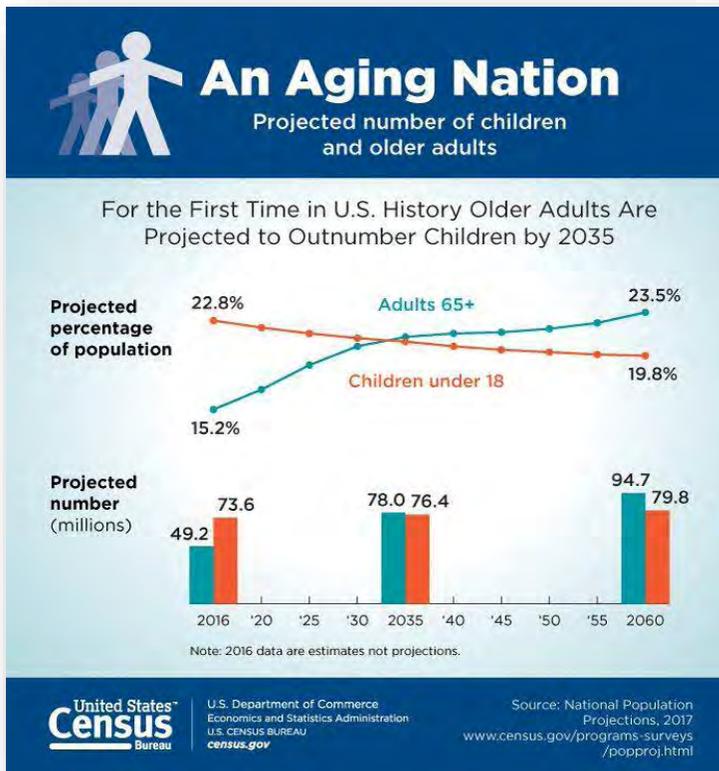
While conducting this study, we relied on a variety of methods of research to gain information about senior housing in the Wichita MSA. One of the most useful tools was the Wichita Business Journal who annually releases lists of its 25 Largest Assisted Living Facilities as ranked by number of residents, its 25 Largest Retirement Communities in Wichita and its 25 Largest Nursing Home Facilities in the Wichita Area. The map attached under this section reflects the location of these facilities as well as documents the void in development in the southern and western portions of the Wichita market. Additional sources of information included visits to numerous facilities, phone interviews with developers and facility managers as well as third party sources.

It should also be noted that during conducting research for this study, the concept of Home Plus was discovered. This is a relatively new concept in nursing home care that provides memory care, care for patients with Alzheimer's as well as dementia care. The skilled nursing facility typically only has six (6) to seven (7) patients that are cared for 24//7. The difference is that rather than developing a new facility from ground up, the owner purchases an existing home and retrofits it to accommodate the specific needs of Home Plus and State licensing boards. The fees for services range from \$5,500 to \$6,500/month. Home Plus has a limited but expanding presence in the Wichita MSA market and should be noted when evaluating senior housing options for Haysville.

## **E. THE GRAYING OF AMERICA**

In just seven years, the number of Americans age 65 and older will increase by 65% from 35 million to 55 million. By 2050, there will be 88 million Americans in this age group, representing one in every five Americans.

As noted in a study commissioned by the St. Louis Federal Reserve entitled The Graying of America: Preparing for What Comes Next, baby boomers have significantly impacted every institution and stage of life they have encountered. This demographic shift will cause a tremendous expansion in the demand for housing and will exponentially increase the need for services to help older adults age in place. Yet, many communities are not prepared—or preparing—to navigate the profound effect of this transition on our communities.

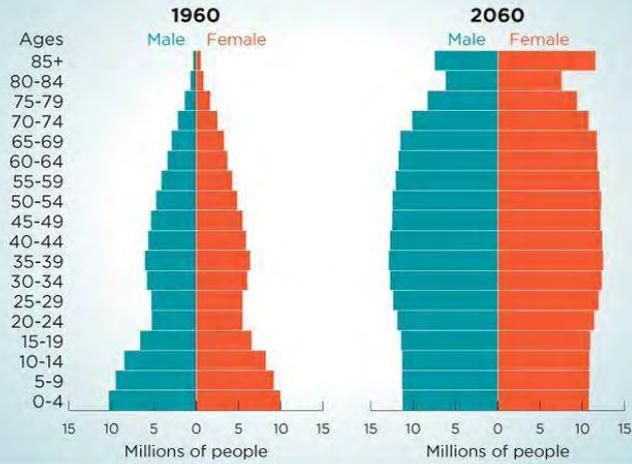


On a more local level, the City of Haysville has seen this transformative pattern emerging in recent years. While the demographics in Haysville proper are not staggering in the number of senior citizens, the City is seeing the graying occur within its City limits as well as surrounding areas. There has been growth in the Wichita MSA housing market and services for senior citizens, but it has been primarily focused in Wichita proper and to its northern and eastern markets. This has left the southern and southwestern markets of the Wichita MSA market underserved. This area includes the City of Haysville.

Despite this, the demographics continue to show that the same Baby Boomers and beyond are present in Haysville and the surrounding market. Graying does not stop at Wichita's southern City Limits. This forms the basis of the findings of this market feasibility study supporting the need and opportunities for new senior housing product development in Haysville.

# From Pyramid to Pillar: A Century of Change

Population of the United States



United States  
**Census**  
Bureau

U.S. Department of Commerce  
Economics and Statistics Administration  
U.S. CENSUS BUREAU  
[census.gov](http://census.gov)

Source: National Population  
Projections, 2017  
[www.census.gov/programs-surveys/popproj.html](http://www.census.gov/programs-surveys/popproj.html)

## Works Cited

The Federal Reserve Bank of St. Louis, *The Graying of America: Preparing for What Comes Next*, 2011.

The United States Census Bureau, *An Aging Nation: Projected Number of Children and Older Adults*

## DEMOGRAPHICS

	2000	2010	2016	2017	2019	2021	2022	2024	2029
<b>POPULATION</b>									
<b>Sedgwick County</b>	452,869	498,365		522,618			537,921		
<b>HAYSVILLE</b>	9,106	10,838	11,070			11,278			
<b>MEDIAN AGE</b>									
<b>Sedgwick County</b>				35.4					
<b>HAYSVILLE</b>			34.6			34.8			
<b>U.S.</b>				38.2					
<b>HOUSEHOLDS</b>									
<b>Sedgwick County</b>	176,444	193,502		200,372			205,418		
<b>HAYSVILLE</b>	3,215	3,862	3,903			3,958			
<b>RACE</b>									
<b>Sedgwick County</b>									
White Alone				74.8					
Black Alone				9.3					
American Indian				1.1					
Asian Alone				4.6					
Other Race				5.7					
Two or More Races				4.4					
Hispanic Origin				14.8					
<b>HAYSVILLE</b>									
White Alone		92.7	92.1			91.3			
Black Alone		0.6	0.6			0.6			
American Indian		1.2	1.2			1.2			
Asian Alone		0.9	0.9			1.0			
Other Race		1.2	1.3			1.5			
Two or More Races		3.5	3.9			4.4			
Hispanic Origin		4.6	5.3			6.3			

Chart II-1: Demographic data of Haysville and Sedgwick County.

DEMOGRAPHICS										
	2000	2010	2016	2017	2019	2021	2022	2024	2029	
<b>AGE</b>										
<b>Sedgwick County</b>										
Total					530,232			548,943	565,494	
Under 5 years					39,294			38,659	38,387	
5-9 years					38,154			68,948	38,335	
10-14 years					37,993			38,086	38,881	
15-17 years					21,945			22,747	22,803	
18-19 years					14,605			15,139	15,178	
20-24 years					35,001			37,661	39,042	
25-29 years					36,858			35,536	38,246	
30-34 years					35,722			35,510	34,212	
35-39 years					35,702			35,350	35,091	
40-44 years					30,725			35,362	35,025	
45-49 years					29,764			30,406	34,988	
50-54 years					28,718			28,799	29,300	
55-59 years					33,375			28,081	28,177	
60-64 years					32,484			32,039	26,979	
65-69 years					27,009			30,933	30,568	
70-74 years					20,166			25,241	29,116	
75-79 years					13,042			17,890	22,383	
80-84 years					8,832			10,588	14,624	
85-89 years					6,755			6,982	8,529	
90-94 years					2,284			3,251	3,462	
95-99 years					1,303			1,104	1,616	
100 years and over					500			632	551	

Chart II-1 (Continued)

DEMOGRAPHICS										
	2000	2010	2016	2017	2019	2021	2022	2024	2029	
<b>AGE</b>										
<b>HAYSVILLE</b>										
Total		10,838	11,068			11,274				
0-4 years		845	829			857				
5-9 years		900	829			834				
10-14 years		965	873			879				
15-24 years		1,539	1,571			1,499				
25-34 years		1,485	1,493			1,612				
35-44 years		1,431	1,416			1,488				
45-54 years		1,355	1,338			1,274				
55-64 years		1,008	1,228			1,240				
65-74 years		661	807			913				
75-84 years		477	475			462				
85+		173	209			214				
<b>INCOME</b>										
<b>Sedgwick County</b>										
Median HH Income				\$53,097			\$57,938			
Average HH Income				\$71,387			\$80,738			
Per Capita Income				\$27,620			\$31,075			
<b>HAYSVILLE</b>										
Median HH Income			\$54,433			\$60,327				
Per Capita Income			\$22,177			\$24,165				

Source: 2018 Esri: US Census Bureau, 2010 Census Summary File 1. Esri forecasts for 2017 and 2022; 2016 Esri: US Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2016 and 2021; Wichita State University Center for Economic Development and Business Research - Kansas Population Forecasts

Chart II-1 (Continued)

## HAYSVILLE REGIONAL MARKET DEMOGRAPHICS

Variable	Haysville, Kansas			
	5 miles	10 miles	20 miles	30 miles
2017 Total Population	56,962	274,913	550,338	550,338
2017 Household Population	56,789	270,238	542,768	542,768
2017 Family Population	47,422	210,970	441,277	441,277
2022 Total Population	57,917	280,590	566,430	566,430
2022 Household Population	57,744	275,915	558,860	558,860
2022 Family Population	48,092	214,573	453,344	453,344

*Source: 2018 Esri, U.S. Census Bureau, Census 2010 Summary File 1., Esri forecasts for 2017 and 2022*

Chart II-2: Haysville Regional Market Demographics



<b>TOP WICHITA AREA SENIOR LIVING FACILITIES</b>			
<b>Num.</b>	<b>Name</b>	<b>Address</b>	<b>Facility Type</b>
1	KMH	402 S Martinson, Wichita, KS	Multi-Service
2	Carrington at Cherry Creek	8200 E Pawnee, Wichita, KS	Multi-Service
3	Catholic Care Center	6550 45th St N, Bel Aire, KS	Multi-Service
4	Avita Rolling Hills	629 S Maize Ct, Wichita, KS	Assisted Living
5	The Oxford Grand	3051 N Parkdale Dr, Wichita, KS	Multi-Service
6	Victoria Falls Assisted Living	408 E Central, Andover, KS	Multi-Service
7	Regent Park	10600 E 13th St N, Wichita, KS	Assisted Living
8	Dove Estates Senior Living	1400 S 183rd St W, Goddard, KS	Multi-Service
9	ComfortCare Homes	7701 E Kellogg, Wichita, KS	Multi-Service
10	Wichita Presbyterian Manor	4700 W 13th St N, Wichita, KS	Multi-Service
11	Via Christi Village Ridge	3636 N Ridge Rd, Wichita, KS	Assisted Living
12	Larksfield Place	2727 N Rock Rd, Wichita, KS	Assisted Living
13	Bluestem Communities	3001 Ivy Dr, North Newton, KS	Multi-Service
14	LakePoint Wichita	1315 N West St, Wichita, KS	Multi-Service
15	Via Christi Village Georgetown	1655 S Georgetown, Wichita, KS	Multi-Service
16	Glen Carr House	1433 N Hamilton Dr, Derby, KS	Assisted Living
17	Carrington House Central	1432 N Waco, Wichita, KS	Multi-Service
18	Park West Plaza/CCRC	505 N Maize Rd, Wichita, KS	Multi-Service
19	Via Christi Village on McLean	777 N McLean Blvd, Wichita, KS	Multi-Service
20	Asbury Park	200 SW 14th St, Newton, KS	Multi-Service
21	Presbyterian Manor of Newton	1200 E 7th St, Newton, KS	Multi-Service
22	Brookdale East Wichita	9191 E 21st St N, Wichita, KS	Multi-Service
23	Via Christi Village on N Broadmoor	1240 N Broadmoor, Wichita, KS	Assisted Living
24	Derby Assisted Living	719 Klein Cir, Derby, KS	Assisted Living
25	LakePoint Augusta	901 LakePoint Dr, Augusta, KS	Multi-Service
26	Prairie Homestead Senior Living	1605 May, Wichita, KS	Multi-Service
27	Sedgwick Plaza Sr. Housing Comm.	2455 N Woodlawn, Wichita, KS	Multi-Service
28	LakePoint El Dorado	1313 S High, El Dorado, KS	Multi-Service
29	Medicalodges Goddard	501 Easy St, Goddard, KS	Multi-Service
30	Colwich Gardens	300 E Chicago, Colwich, KS	Assisted Living
31	Larksfield Place Retirement Comm.	7373 E 29th St N, Wichita, KS	Retirement Community
32	Maple Gardens Village	10200 W Maple, Wichita, KS	Retirement Community
33	Reflection Ridge Resort	2300 N Tyler Rd, Wichita, KS	Retirement Community
34	Grasslands Estates	10665 W 13th St N, Wichita, KS	Retirement Community
35	The Regent	2050 N Webb, Wichita, KS	Retirement Community
36	Shadyway Plaza Tower	1421 N Spruce, Wichita, KS	Retirement Community
37	Catholic Care Center	6700 E 47th St N, Bel Aire, KS	Nursing
38	Sandpiper Healthcare/Rehab	5808 W 8th St, Wichita, KS	Nursing
39	Regent Park Rehab/Healthcare	10604 E 13th St N, Wichita, KS	Nursing
40	Larksfield Place Healthcare	2828 N Gouverneur, Wichita, KS	Nursing
41	Reeds Cove Health/Rehab	2114 N 127th Ct E, Wichita, KS	Nursing
42	Victoria Falls Nursing/Rehab	224 E Central, Andover, KS	Nursing
43	Derby Health and Rehab	731 Klein Cir, Derby, KS	Nursing
44	Family Health and Rehab	639 S Maize Ct, Wichita, KS	Nursing

Accompanying data for Figure II-1

### **3. WHAT DOES HAYSVILLE HAVE TO OFFER?**

#### **A. SUMMARY OF TOOLS AND RESOURCES**

One of the first questions that most developers will ask themselves is ‘What does the community have to offer?’ From an Economic Developer’s point of view, there are numerous reasons to invest in Haysville.

At the top of the list is a forward-thinking and inspired City Council led by a Mayor whose entrepreneurial approach to governing has created an environment of opportunities for the City of Haysville. The City has a small but professional administrative staff that is committed to blazing new trails. Most importantly, there is a commitment to working together as a tight-knit team. This effort is led by the Economic Development Director who would manage this project on a daily basis, to ensure that once a developer has been selected, their needs are met so as to ensure a smooth development process.

#### **Demand**

There has been a repeated demand for additional senior housing product in Haysville for several years. In 2013, members of the senior population presented a petition to the City Council, requesting that the City work to provide additional senior housing in Haysville. That demand has grown due to two main reasons: growth in the southern and southwestern portions of the Wichita MSA and the continued “graying effect” of the population as a whole.

#### **Land Bank**

Haysville has approximately 15.4 acres within the River Forest subdivision that it holds within its Land Bank. This property is located on the north side of a beautiful lake that sits in the middle of the subdivision. As the City is the owner of the property, they have indicated a willingness to offer this land to the ultimate developer and operator of the desired transitional senior living community. The current value of the land is estimated to be \$500,000. The City has also expressed a willingness to explore facilitating the completion of bringing all necessary utilities to the site once capacities are known. A conceptual site plan is shown in Section III, A., i.

#### **Other Possible Assistance**

As mentioned above, Haysville believes that this is a tremendous opportunity for the right developer and operator. They also believe that this will be a long term partnership between the operator and the City. The City recognizes that the transitional senior living community

that is envisioned is one that will take substantial capital investment. For that reason, the City is willing to explore the following incentives which may be offered on a case-by-case basis:

- Industrial Revenue Bond
- Reduced or Waived Building Permits
- Reduced or Waived Sewer Taps
- Tax Abatement
- Free trees from the Grow Haysville Tree Farm
- Free office space during construction

The City of Haysville and its Office of Economic Development have indicated their ability to develop a creative incentive package to meet the needs of any developer of a project of the desired scope of magnitude of this project.

**Property Taxes**

The property taxes on the River Forest property are relatively low. Based upon a quick survey of neighboring municipalities, the City can confidently say that locating in Haysville is a fiscally wise decision by any company. The current tax obligations within the River Forest subdivision are as follows:

• 0101	State	\$ 1.50000
• 0201	County	29.39300
• 0510	City of Haysville	48.50000
• 0604	USD 261	29.02300
• 0604	USD 261 SG	20.00000
• 0707	USD 261 BOND	6.94400
• 1108	COUNTY FIRE DIST.	
	NO BONDS	<u>18.39200</u>
		<b>\$153.75200</b>

It should be noted that potential developers must view this project as a for-profit business. They will no doubt conduct their own feasibility study prior to making any decision to invest. What they will find, and what Haysville needs to continue to communicate to the development community (and the public) is that this development is going to be unique. Namely, this will be a FOR PROFIT, TRANSITIONAL LIVING COMMUNITY for seniors that offers a full spectrum of

care and amenities. The only other new product being built in the area at the present time is a seventy-six (76) unit affordable living project in Derby that will have a few market rate units included. The Haysville project will be unique to the southern and western Wichita MSA.

## **B. AVAILABLE LABOR FORCE**

The two largest expenses that a developer and operator will face in moving forward with the Haysville senior housing project are construction and labor (ongoing staffing of the facility). As has been covered in the in the previous section, Haysville has numerous strategies available to assist in working with the developer to construct the facility. The second largest expense, labor, is addressed here.

The accompanying Wichita MSA Bureau of Labor Statistics Wage Survey for May of 2018 was provided by the Workforce Alliance of Central Kansas. From this complete survey, the typical employment categories for senior living facilities have been extracted and incorporated into Chart 3 for the reader's review – Senior Living Facility Occupations. Upon analysis, it becomes evident that staffing a facility in Haysville will not be difficult as there are individuals with the necessary skill sets registered in the Workforce Alliance system as well as in the existing marketplace. Additionally, it is evident that the mean and median wages for the vast majority of the categories listed are reasonable.

Workforce Alliance will be an invaluable partner to Haysville as it works to accomplish its goal of bringing forth a developer of a quality transitional senior living community. In visiting with Ms. Amanda Duncan, the Vice President and Chief Business Development Officer for Workforce Alliance, she reports that healthcare is a demand occupation and as such, additional workforce resources and revenues can be directed to assisting Haysville and the selected developer in meeting the staffing and training needs for the Haysville project. These services may include, but are not limited to:

- Onsite mobile workforce center
- Pre-employment screening
- On the job training
- Cooperative partnerships with HUSD and WSU
- Other no-cost services

Contact information:

Ms. Amanda Duncan  
Vice President & Chief Business Development Officer  
Workforce Alliance of Central Kansas  
316-640-4125 (cell)



**WICHITA MSA BLS WAGE SURVEY – May 2018**  
**SENIOR LIVING FACILITY OCCUPATIONS**

<b>Occupation Code</b>	<b>Occupation Title</b>	<b>High Mean</b>	<b>High Pct. 10</b>	<b>H Pct. 25</b>	<b>H Median</b>	<b>H Pct. 75</b>	<b>H Pct. 90</b>
11-0000	Management Occupations	\$47.54	\$22.11	\$30.82	\$41.19	\$57.37	\$79.17
11-1011	Chief Executive	\$78.05	\$34.76	\$45.57	\$66.35	#	#
11-1021	General & Operations Mgr.	\$45.96	\$21.18	\$28.00	\$38.84	\$56.35	\$79.23
11-3121	Human Resources Mgr.	\$47.71	\$31.27	\$34.94	\$40.97	\$53.03	\$71.60
11-9051	Food Service Managers	\$31.15	\$17.65	\$22.35	\$32.49	\$37.96	\$45.37
11-9111	Medical & Health Services Mgr.	\$45.21	\$26.21	\$31.45	\$39.43	\$49.79	\$67.79
13-2099	Financial Specialists, All Other	\$26.48	\$14.32	\$17.94	\$23.59	\$31.84	\$41.63
21-1022	Healthcare Social Workers	\$25.29	\$18.97	\$21.57	\$25.37	\$28.85	\$31.73
29-0000	Healthcare Practitioners & Technical Occupations	\$32.89	\$14.59	\$20.07	\$25.69	\$35.25	\$55.14
29-1031	Dietitians & Nutritionists	\$29.22	\$16.65	\$18.73	\$28.68	\$37.51	\$45.53
29-1141	Registered Nurses	\$27.32	\$20.39	\$22.54	\$26.50	\$31.20	\$36.83
29-1171	Nurse Practitioners	\$40.37	\$26.30	\$30.23	\$38.11	\$45.86	\$52.22
29-2052	Pharmacy Technicians	\$14.78	\$10.56	\$12.10	\$14.05	\$17.24	\$20.54
29-2061	Licensed Practical & Vocational Nurses	\$20.82	\$16.24	\$18.37	\$21.02	\$23.35	\$25.44
29-2071	Medical Records & Health Information Technicians	\$17.31	\$11.55	\$13.38	\$16.47	\$20.99	\$24.37
29-2099	Health Technologists & Technicians, All Other	\$20.53	\$12.52	\$14.14	\$18.98	\$28.23	\$35.36
31-0000	Healthcare Support Occupations	\$13.37	\$9.92	\$10.72	\$12.08	\$14.62	\$18.49
31-1014	Nursing Assistants	\$11.62	\$9.85	\$10.40	\$11.30	\$12.45	\$14.39
31-2011	Occupational Therapy Assistants	\$28.64	\$18.14	\$23.04	\$29.64	\$34.97	\$37.91
31-2021	Physical Therapy Assistants	\$26.81	\$17.57	\$21.28	\$26.91	\$32.82	\$36.65
31-2022	Physical Therapy Aides	\$9.79	\$8.07	\$8.60	\$9.46	\$10.82	\$12.46
31-9092	Medical Assistants	\$14.20	\$10.57	\$12.09	\$13.91	\$16.08	\$18.57
31-9097	Phlebotomists	\$14.26	\$10.55	\$11.96	\$14.02	\$16.45	\$18.71
31-9099	Healthcare Support Worker's, All-Other	\$19.54	\$8.92	\$16.92	\$21.52	\$23.47	\$25.43
35-0000	Food Preparation & Serving Related Occupations	\$10.43	\$7.93	\$8.51	\$9.49	\$11.70	\$14.55

Chart III-1 – Wichita MSA wage survey for senior living facility occupations.

**WICHITA MSA BLS WAGE SURVEY – May 2018**  
**SENIOR LIVING FACILITY OCCUPATIONS**

35-1011	Chefs & Head Cooks	\$14.98	\$10.06	\$11.98	\$14.28	\$17.19	\$19.59
35-1012	First-Line Supervision of Food Preparation & Serving Workers	\$13.59	\$9.38	\$10.57	\$12.46	\$15.71	\$19.68
35-2012	Cooks, Institution & Cafeteria	\$11.50	\$8.72	\$9.98	\$11.18	\$12.69	\$14.87
35-2021	Food Preparation Workers	\$49.94	\$8.00	\$8.54	\$9.41	\$11.01	\$13.24
35-3041	Food Servers, Non-Restaurant	\$8.98	\$7.82	\$8.20	\$8.82	\$9.46	\$10.76
35-9021	Dishwashers	\$9.86	\$8.00	\$8.61	\$9.62	\$11.17	\$12.22
37-0000	Building & Grounds Cleaning & Maintenance Occupations	\$12.74	\$8.18	\$9.11	\$11.25	\$14.99	\$19.14
37-1011	First Line Supervisors of Housekeeping & Janitorial Workers	\$17.58	\$9.98	\$11.77	\$17.02	\$22.17	\$27.00
37-1012	First Line Supervisors of Landscaping, Lawn Service, and Grounds	\$27.35	\$21.34	\$21.08	\$27.79	\$33.66	\$37.05
37-3011	Landscaping & Groundskeeping Workers	\$13.32	\$8.69	\$10.06	\$12.15	\$16.33	\$19.14
39-5012	Hairdressers, Hairstylists	\$11.83	\$8.06	\$8.69	\$9.83	\$13.85	\$18.17
39-9021	Personal Care Aides	\$10.36	\$8.29	\$9.48	\$10.57	\$11.51	\$12.11
39-9032	Recreation Workers	\$13.60	\$9.93	\$10.91	\$12.65	\$14.96	\$19.05
39-9041	Residential Advisors	\$11.32	\$8.04	\$8.73	\$10.44	\$13.83	\$15.51
41-3099	Sales Representatives, Services, All Other	\$25.14	\$11.21	\$14.72	\$22.68	\$30.04	\$41.92
43-0000	Office & Administrative Support Occupations	\$16.84	\$9.87	\$12.01	\$15.23	\$19.76	\$27.10
43-3031	Bookkeeping, Accounting, & Auditing Clerks	\$17.52	\$10.60	\$13.96	\$17.10	\$20.90	\$24.66
43-3051	Payroll & Timekeeping Clerks	\$20.35	\$15.40	\$16.77	\$19.19	\$23.42	\$27.50
43-3061	Procurement Clerks	\$15.46	\$8.48	\$12.75	\$15.83	\$18.89	\$21.45
43-4171	Receptionists & Information Clerks	\$13.34	\$9.42	\$10.86	\$13.02	\$15.12	\$18.18
47-4090	Misc. Construction & Related Workers	\$20.13	\$11.76	\$15.25	\$20.91	\$24.25	\$28.25
49-9099	Installation, Maintenance & Repair Works, All Other	\$17.28	\$10.28	\$12.12	\$16.85	\$21.63	\$24.59
51-6011	Laundry & Dry Cleaning Workers	\$10.57	\$8.26	\$9.46	\$10.57	\$11.61	\$12.73

Chart III-1 (continued)

Source: Workforce Kansas, Contact – Amanda Duncan 316-640-4125, [amandaduncan@workforce-ks.com](mailto:amandaduncan@workforce-ks.com)

## 4. FINAL MARKET REALITY THOUGHTS

We would be remiss if we did not remind the City to not lose sight of its initial objective - to determine if the market would support new senior housing facilities. If we found that the market support was there, what type or variety could be supported in Haysville was the next question that was to be answered. We very quickly concluded that based upon primary and secondary research, there is a tremendous void in Haysville and the southern and western portions of the Wichita MSA marketplace not only for senior housing but specifically for market rate senior housing options.

While the initial interest was in an assisted living facility, we found that after evaluating the marketplace, participating in formal and informal focus groups and holding one-on-one meetings with local officials and business leaders, the concept of a transitional senior living community would better suit the community's needs. This recommendation is based upon the 100% occupancy of Haysville's existing senior housing facilities with waiting lists of three (3) to eighteen (18) months which has created a tremendous amount of demand in Haysville, and in the surrounding southern and western portions of the Wichita MSA.

The proposed transitional senior living community is a unique development within the Wichita market. Many of the market's new senior housing investments in the last ten (10) years have been fairly traditional in their design and services. What is proposed for Haysville is an innovative community where seniors choose to downsize because of amenities, fun comradery and security. These benefits will far outweigh the emotional difficulties of selling and moving from their homes.

The City may be told by a developer or two that the market will not support this type of product and that they know best what should be built, namely, the traditional assisted living facility with 30-40 apartments of which as many as half with rental rates not set at market rate. We would urge you to not settle. There is a reason that this type of development has been built all over the Wichita MSA and frankly, the U.S. It is relatively easy in that it is a cookie-cutter design, often receives some sort of tax credit or HUD assistance and there are very limited, if any, amenities.

This study has proven that a quality, unique product such as the transitional senior housing community that is proposed can be supported, and is frankly, needed by the residents of Haysville as well as the southern and western portions of the Wichita MSA. Couple this with the additional patio home product that is recommended, and seniors truly will have their choice of housing options available to them in Haysville. Secondly, the benefits to the City

will be significant in that many new, skilled healthcare jobs will be created by the new development. There will be new property tax revenues associated with the construction of the transitional senior housing community and the patio homes. This benefits the City, County and School District directly. And finally, there will be indirect sales tax revenues that will benefit the City from goods that are purchased by employees as well as the development within the Haysville.

## GLOSSARY OF SENIOR HOUSING TERMS

**Active Adult Community.** Typically restricted to adults fifty five (55) and older, these communities offer residential living, typically in single-family home, townhomes or condominiums, either for sale or rent. Meals, outdoor maintenance and other services as well as other amenities might be included in the resident's monthly fee. Some of these amenities could include a clubhouse, golf course, etc.

Assistance with daily living is not typically provided although referrals may be offered by management. Typically, residents have a choice to take advantage of services such as transportation, social activities, interior and exterior maintenance, etc.

**Activities of Daily Living (ADL).** Bathing, eating, grooming, dressing, toileting, medication management and other activities associated with daily living.

**Aging in Place.** A concept that advocates allowing residents to remain in their current living environment, regardless of any physical or mental decline that may occur with aging, as opposed to moving the person from one care environment to the next as needs change.

**Alzheimer's Care Center.** This service offers a safe and controlled residential center that specializes in providing care for those with Alzheimer's and other forms of memory loss.

**Assisted Living.** A special combination of housing, personalized supportive services and health care designed to meet the needs — both scheduled and unscheduled — of those who require help with daily activities. Many assisted living communities are freestanding. Within a senior community setting, services may include any or all of the following:

- Three meals a day served in a common dining area
- Housekeeping services
- Transportation
- Assistance with eating, bathing, dressing, toileting and walking
- Access to health and medical services
- 24/7 security and staff availability
- Emergency call system for each resident's home
- Health promotion and exercise programs
- Medication reminders
- Personal laundry services
- Social and recreational activities

Often, assisted living includes memory support services within the same community. Differing from a senior living community with a continuum of care, assisted living or memory support communities generally don't require entrance fees. Adults are directly admitted to the community and pay a monthly rental rate plus medication and other medically-related services.

**Congregate Housing (also: Congregate Living).** These are generic terms generally referring to independent living in separate senior apartments, with opportunities to enjoy shared activities with other residents. Convenience/support services may include meals, housekeeping, transportation, or others. The residences may be available for sale or rent, or require a buy-in fee.

**Continuing Care Retirement Community (CCRC), also known as Life Plan Community or Transitional Living Community.** A community that offers several kinds of residences for independent living and various levels of health care services. In independent living, a community may offer apartments, freestanding homes, attached homes or other residential options. Assisted living residents usually live in apartments, while residents living in skilled nursing and memory support areas generally reside in suites or rooms, either private or shared.

CCRCs usually provide a written agreement or long-term contract between the resident (frequently lasting the term of the resident's lifetime) and the community. CCRCs typically offer maintenance-free living, a wide variety of services and amenities, and access to a continuum of health care, commonly all on one campus or site.

Most CCRCs require a one-time upfront entrance fee and a predictable monthly fee, which gives the resident the right to occupy an independent living residence, enjoy all the services and amenities offered by the community, and have access to long-term on-site health care when and if they need it. If the resident requires assisted living, memory support or skilled nursing, the CCRC provides the appropriate level of care, for a limited period of time at the independent living monthly rate — or possibly at a slightly raised or discounted rate.

CCRCs are designed to provide an active, fulfilling lifestyle, along with peace of mind for the future. Age restriction is usually sixty-two (62)+ but may vary from one community to another. While all CCRCs offer residential accommodations and amenities, the range and cost of entrance fees and monthly service fees may vary.

**Continuum of Care.** A comprehensive range of programs and levels of care for seniors. This may include independent living, assisted living, skilled nursing, rehabilitation, memory support and home health care.

**Dementia Care.** A variety of special services that offer a secure, protected and healthy environment for individuals with memory impairment.

**For-Profit Senior Living Communities.** Senior living communities, either privately owned or part of a system of communities, in which for-profit organizations work on behalf of their shareholders.

**Home Plus.** A relatively new concept in nursing home care that provides memory care, care for patients with Alzheimer's as well as dementia care. The skilled nursing facility typically only

has six (6) to seven (7) patients that are cared for 24/7. Rather than developing a new facility from ground up, the owner purchases an existing residential home and retrofits it to accommodate the specific needs of Home Plus and State licensing boards. The fees for services range from \$5,500 to \$6,500/month. Home Plus has a limited but expanding presence in the Wichita MSA market and should be noted when evaluating senior housing options for Haysville.

**Hospice Care.** Philosophy and approach to providing comfort and care at life's end. It can include medical, counseling and social services, and is provided in-home, in specialized hospitals or hospice care centers. Hospice coverage is available to qualified individuals by Medicare, Medicaid and most private insurance providers.

**Independent Living.** This is a residential living setting for seniors who require minimal or no assistance. Hospitality and supportive services may or may not be provided. Independent living residences may be apartments or freestanding homes obtained either for an entrance fee or through a rental arrangement. A monthly fee for services and amenities may be applied.

**Long-Term Care.** Care given in the form of support and medical services to people who, due to illness or injury, have lost some or all of their capacity to function without assistance. Within a retirement community setting, long-term care may refer to assisted living, skilled nursing or memory support. Conversely, **short-term care** may refer to rehabilitation therapies or respite care.

**Memory Care / Memory Support.** Many senior living communities include specialized areas dedicated to caring for residents needing memory care for Alzheimer's or other forms of dementia or cognitive impairments. Some communities focus solely on memory care and support. Services and amenities are usually on site, with group activities and events included. Most memory care programs include innovative technologies and interventions that can decrease the anxieties and difficulties related to dealing with dementia.

**Monthly Service Fees (also: Monthly Fees).** The amount a senior living community charges its residents for the services and amenities associated with residency. This amount varies depending on the size of the residence and the number of occupants, as well as the range of services (independent, assisted, skilled or memory care) and amenities offered. Most communities raise these fees slightly on an annual basis, although the scheduling and amount of these increases can vary widely from one community to another and from state to state.

**Not-for-Profit / Nonprofit.** A defined status of ownership and/or operation typically characterized by a governing body of a community-based board of trustees, who are all volunteers. Board members donate their time and talents to ensure that a not-for-profit organization's approach to caring for older people responds to local needs and to meet the nonprofit organization's mission.

In a not-for-profit senior living community, surplus income is reinvested in the community to improve or expand services for the residents.

Many not-for-profit organizations are associated with religious denominations or fraternal groups. Not-for-profits may also interact with Congress and federal agencies to further causes that serve the elderly.

**Nursing Home.** Licensed daily rate or rental properties that are technically referred to as skilled nursing facilities (SNF) or nursing facilities (NF), where the majority of individuals require 24/7 nursing and/or medical care. In most cases, nursing homes are licensed for Medicare/Medicaid reimbursement. They generally offer a community setting, private or shared rooms, and around-the-clock medical staff, including RNs (registered nurses), LPNs (licensed practical nurses), and CNAs (certified nursing assistants). Many nursing homes are freestanding communities.

**Occupational Therapy.** A range of therapies and treatments generally administered by a licensed therapist to help individuals relearn activities of daily living, thereby promoting recovery or rehabilitation.

**Palliative Care.** A medical specialty that focuses on the relief of the pain, stress and other debilitating symptoms of serious illness, and is often delivered at the same time as treatment meant to cure the patient. The goal is to relieve suffering and provide the best possible quality of life for patients and their families. With customized treatment plans, palliative care can relieve symptoms such as pain, shortness of breath, fatigue, constipation, nausea, loss of appetite and difficulty sleeping.

**Physical Therapy.** The treatment of disease or injury by physical and mechanical means (massage, regulated exercise, water, light, heat and electricity). Physical therapists plan and administer prescribed physical therapy treatments for patients to help rebuild strength, mobility and fitness.

**Rehabilitation.** Therapeutic care for individuals requiring intensive physical, occupational or speech therapy, provided to restore them to a former capacity. Many communities that offer a continuum of care have rehabilitation services, both short-term and long-term care levels.

**Respite Care.** Services that provide caregivers with temporary relief from tasks associated with caregiving (e.g., in-home assistance, short nursing home stays, and adult day care). In the senior living community setting, it usually refers to an arrangement whereby a senior stays at the community for a few days or weeks, perhaps to give their caregiver at home a break, or to experience the community's accommodations, services and amenities on a trial basis.

**Senior Living Community (Retirement Community).** A community that provides residential accommodations for older adults, generally aged 62+. Far different from the traditional "nursing home," these communities offer wide-ranging services and amenities, activities and events to appeal to various interests, and usually provide access to health care services.

**Second Person Fee.** The monthly fee some senior living communities charge to have a second person living in one residence. This fee provides both residents full access to all services and amenities offered.

**Senior Apartments.** Multifamily residential rental properties restricted to adults 55+. These properties don't have central kitchen and dining facilities, and generally don't provide meals to residents. However, they may offer community rooms, social activities and other amenities.

**Short-Term Care.** Within a senior living community setting that offers health care, this may refer to rehabilitation therapies, offered for a specified length of time after surgery, illness or accident. It may also refer to respite care.

**Speech/Language Therapy.** This range of therapies and treatments is generally administered by a licensed therapist to help an individual with speaking, understanding, reading, writing and swallowing.

**Subacute Care.** Typically following a stay in a hospital, this is rehabilitation or complex medical care for serious conditions that aren't urgent or life-threatening. Hospitals typically don't provide sub-acute care on an ongoing basis. This type of care may be delivered in the patient's home or by trained staff at a skilled nursing facility.

**Transitional Care.** This type of care is designed for those who are being discharged from an acute care situation, such as a hospital stay, but aren't physically ready to return to their home. Short-term in nature, this care may be specialized for specific conditions, and also includes rehabilitative services.

**Transportation Services.** In a senior living community setting, this refers to transporting residents to and from the community. Most facilities have buses and/or vans, although some offer private car service in town cars, a safe and reliable way to take residents where they need to go.

At most communities, some scheduled transportation is included within the monthly service fee, such as trips to medical appointments, shopping and group events. Community-provided transportation may also be available to residents for personal use; this might or might not require an additional fee. \*

**Veteran's Aid & Attendance Pension Program.** Military veterans and/or surviving spouses may be eligible for benefits that can be used to assist with the costs of care in the home or in an assisted living or skilled nursing community.

The Veteran's Aid and Attendance Pension is tax-free and paid directly to the veteran or surviving spouse. Benefits may range from approximately \$1,000 to \$2,000 per month. Veterans must be at least 65 years old or be permanently disabled and meet eligibility requirements to qualify. Income, asset and medical eligibility requirements must also be met.

The government doesn't notify veterans that they may be entitled to these benefits, so many eligible senior veterans are unaware of this program.

\*Should transportation not be provided by the ultimate developer, this will be problematic for the residents until such time as the City of Haysville and its regional transportation partners address the great need for transportation for residents within Haysville to Wichita and Derby. This topic is discussed in greater depth in the Recommendations section in this report.

***Sources: American Senior Housing Association, Where You Live Matters and Johnson & Associates***

# ASHA 50

American  
Seniors  
Housing  
Association  
2015

*The 50 largest  
U.S. seniors housing  
real estate owners  
and operators*



## **Special supplement to**

- *Seniors Housing Business*
- *Heartland Real Estate Business*
- *Northeast Real Estate Business*
- *Southeast Real Estate Business*
- *Texas Real Estate Business*
- *Western Real Estate Business*

**North Shore Place, Northbrook, IL**  
Photo Courtesy of Senior Lifestyle Corporation, Chicago, IL



# 2015 ASHA 50 Owners

50 Largest U.S. Seniors Housing Owners as of June 1, 2015

2015 Rank	Company	Headquarters	Chief Executive	2015 Properties	2015 Units
1	Brookdale Senior Living	Brentwood, TN	T. Andrew Smith	976	82,356
2	Ventas Inc.	Chicago, IL	Debra Cafaro	785	69,708
3	Health Care REIT Inc.	Toledo, OH	Thomas DeRosa	611	59,786
4	HCP Inc.	Irvine, CA	Lauralee Martin	491	49,731
5	Senior Housing Properties Trust	Newton, MA	David Hegarty	297	34,772
6	Boston Capital	Boston, MA	Jack Manning	486	29,741
7	NorthStar Healthcare	New York, NY	James Flaherty, III	209	17,514
8	Senior Lifestyle Corporation	Chicago, IL	Jon DeLuca	176	16,685
9	New Senior Investment Group	New York, NY	Susan Givens	124	14,838
10	Holiday Retirement	Lake Oswego, OR	Kai Hsiao	114	13,768
11	Harrison Street Real Estate Capital	Chicago, IL	Michael Gordon	107	12,359
12	National Health Investors (NHI)	Murfreesboro, TN	Eric Mendelsohn	103	8,678
13	Highridge Costa Companies	Gardena, CA	Michael Costa	84	8,402
14	ACTS Retirement-Life Communities Inc.	West Point, PA	J. Mark Vanderbeck	21	7,982
15	Enlivant	Chicago, IL	Jack Callison	177	7,829
16	American House Senior Living Communities	Bloomfield Hills, MI	Dale Watchowski	61	7,002
17	Presbyterian Homes & Service	Roseville, MN	Daniel Lindh	38	6,837
18	Brightview Senior Living	Baltimore, MD	Marilynn Duker	60	6,750
19	Capital Senior Living Corporation	Dallas, TX	Lawrence Cohen	68	6,718
20	Erickson Living	Baltimore, MD	R. Alan Butler	8	5,787
21	CNL Healthcare Properties	Orlando, FL	Steve Mauldin	59	5,627
22	LTC Properties Inc.	Westlake Village, CA	Wendy Simpson	100	5,414
23	Westminster Communities of Florida	Orlando, FL	Roger Stevens	19	5,413
24	Pacifica Senior Living	San Diego, CA	Deepak Israni	54	5,265
25	Hawthorn Retirement Group LLC	Vancouver, WA	Patrick Kennedy	43	5,236



# 2015 ASHA 50 Owners

*50 Largest U.S. Seniors Housing Owners as of June 1, 2015*

<b>2015 Rank</b>	<b>Company</b>	<b>Headquarters</b>	<b>Chief Executive</b>	<b>2015 Properties</b>	<b>2015 Units</b>
26	Sabra Health Care REIT Inc.	Irvine, CA	Richard Matros	54	5,198
27	USA Properties Fund Inc.	Roseville, CA	Geoffrey Brown	36	5,110
28	Covenant Retirement Communities Inc.	Skokie, IL	Terri Cunliffe	15	4,865
29	LCS	Des Moines, IA	Edward Kenny	28	4,787
30	Benchmark Senior Living	Wellesley, MA	Thomas Grape	50	4,587
31	The Evangelical Lutheran Good Samaritan Society	Sioux Falls, SD	David Horazdovsky	25	4,446
32	Lifespace Communities	Des Moines, IA	Sloan Bentley	12	4,084
33	Kayne Anderson Real Estate Advisors	Boca Raton, FL	Al Rabil	17	3,878
34	The Kendal Corporation	Kennett Square, PA	John Diffey	12	3,729
35	Vi Living	Chicago, IL	Randal Richardson	10	3,577
36	ARC Healthcare Trust II	New York, NY	Todd Jensen	49	3,560
37	Lutheran Senior Services	St. Louis, MO	John Kotovsky	11	3,406
38	Belmont Village Senior Living	Houston, TX	Patricia Will	24	3,390
39	Spectrum Retirement Communities LLC	Denver, CO	Jeffrey Kraus & John Sevo	28	3,339
40	Merrill Gardens	Seattle, WA	David Eskenazy	28	3,286
41	Presbyterian Senior Living	Dillsburg, PA	Stephen Proctor	20	3,120
42	Sunshine Retirement Living	Bend, OR	James Matthews	23	3,117
43	Five Star Senior Living	Newton, MA	Bruce Mackey, Jr.	31	3,064
44	Cornerstone Affiliates	Pleasanton, CA	David Ferguson	11	3,057
45	Vintage Senior Living	Newport Beach, CA	Brian Flornes	23	3,056
46	Lytle Enterprises	Bellevue, WA	Charles & Karen Lytle	19	3,027
47	Ohio Presbyterian Retirement Services	Columbus, OH	Laurence Gumina	12	2,986
48	ROC Seniors Housing Fund Manager	Orlando, FL	Robb Chapin	28	2,978
49	Pacific Retirement Services	Medford, OR	Brian McLemore	9	2,826
50	Asbury Communities	Germantown, MD	Doug Leidig	5	2,780



# 2015 ASHA 50 Operators

*50 Largest U.S. Seniors Housing Operators as of June 1, 2015*

2015 Rank	Company	Headquarters	Chief Executive	2015 Properties	2015 Units
1	Brookdale Senior Living	Brentwood, TN	T. Andrew Smith	1,138	110,443
2	Holiday Retirement	Lake Oswego, OR	Kai Hsiao	308	37,657
3	LCS	Des Moines, IA	Edward Kenny	123	32,172
4	Five Star Senior Living	Newton, MA	Bruce Mackey, Jr.	272	31,267
5	Sunrise Senior Living LLC	McLean, VA	Chris Winkle	245	22,561
6	Erickson Living	Baltimore, MD	R. Alan Butler	17	20,517
7	Senior Lifestyle Corporation	Chicago, IL	Jon DeLuca	201	20,334
8	Atria Senior Living Inc.	Louisville, KY	John Moore	153	17,958
9	Capital Senior Living Corporation	Dallas, TX	Lawrence Cohen	118	11,632
10	Elmcraft Senior Living	Louisville, KY	Pat Mulloy	101	8,874
11	ACTS Retirement-Life Communities Inc.	West Point, PA	J. Mark Vanderbeck	21	7,982
12	Enlivant	Chicago, IL	Jack Callison	177	7,829
13	Watermark Retirement Communities	Tucson, AZ	David Barnes & David Freshwater	38	7,483
14	Meridian Senior Living	Hickory, NC	Charles Trefzger	130	7,026
15	American House Senior Living Communities	Bloomfield Hills, MI	Dale Watchowski	61	7,002
16	Leisure Care	Seattle, WA	Dan Madsen	43	6,943
17	Presbyterian Homes & Services	Roseville, MN	Daniel Lindh	38	6,837
18	Brightview Senior Living	Baltimore, MD	Marilynn Duker	61	6,795
19	Westminster Communities of Florida	Orlando, FL	Roger Stevens	21	5,713
20	Hawthorn Retirement Group LLC	Vancouver, WA	Patrick Kennedy	43	5,236
21	USA Properties Fund Inc.	Roseville, CA	Geoffrey Brown	37	5,227
22	Benchmark Senior Living	Wellesley, MA	Thomas Grape	51	4,884
23	Covenant Retirement Communities Inc.	Skokie, IL	Terri Cunliffe	15	4,865
24	Integral Senior Living	Carlsbad, CA	Collette Valentine	44	4,738
25	The Evangelical Lutheran Good Samaritan Society	Sioux Falls, SD	David Horazdovsky	30	4,557



# 2015 ASHA 50 Operators

*50 Largest U.S. Seniors Housing Operators as of June 1, 2015*

<b>2015 Rank</b>	<b>Company</b>	<b>Headquarters</b>	<b>Chief Executive</b>	<b>2015 Properties</b>	<b>2015 Units</b>
26	Pacifica Senior Living	San Diego, CA	Deepak Israni	43	4,232
27	Frontier Management LLC	Portland, OR	Greg Roderick	59	4,226
28	Lifespace Communities	Des Moines, IA	Sloan Bentley	12	4,084
29	Greystone	Irving, TX	John Spooner	14	4,021
30	Front Porch Communities & Services	Glendale, CA	John Woodward	22	3,944
31	Discovery Senior Living	Bonita Springs, FL	Thomas Harrison	17	3,790
32	Pacific Retirement Services	Medford, OR	Brian McLemore	13	3,762
33	The Kendal Corporation	Kennett Square, PA	John Diffey	12	3,729
34	Gardant Management Solutions	Bradley, IL	Rod Burkett	40	3,677
35	Asbury Communities	Germantown, MD	Doug Leidig	7	3,660
36	Senior Resource Group	Solana Beach, CA	Michael Grust	18	3,642
37	Vi Living	Chicago, IL	Randy Richardson	10	3,577
38	Spectrum Retirement Communities LLC	Denver, CO	Jeffrey Kraus & John Sevo	30	3,536
39	Kisco Senior Living LLC	Carlsbad, CA	Andrew Kohlberg	19	3,430
40	Lutheran Senior Services	St. Louis, MO	John Kotovsky	11	3,406
41	Belmont Village Senior Living	Houston, TX	Patricia Will	24	3,390
42	JEA Senior Living	Vancouver, WA	Cody Erwin	48	3,375
43	Vintage Senior Living	Newport Beach, CA	Brian Flornes	24	3,289
44	Merrill Gardens	Seattle, WA	David Eskenazy	28	3,286
45	Presbyterian Senior Living	Dillsburg, PA	Stephen Proctor	20	3,120
46	Cornerstone Affiliates	Pleasanton, CA	David Ferguson	11	3,057
47	Milestone Retirement Communities LLC	Vancouver, WA	Paul Dendy	31	3,025
48	Ohio Presbyterian Retirement Services	Columbus, OH	Laurence Gumina	12	2,986
49	Sagora Senior Living	Fort Worth, TX	Bryan McCaleb	19	2,889
50	Western Seniors Housing Inc.	Irvine, CA	Anthony Sandoval	32	2,883

From the Wichita Business Journal

[:https://www.bizjournals.com/wichita/subscriber-only/2017/09/15/largest-retirement-communities-in-the.html](https://www.bizjournals.com/wichita/subscriber-only/2017/09/15/largest-retirement-communities-in-the.html)

## The List

# Largest retirement communities in the Wichita area Ranked by Total number of retirement community units

Locally Researched by: Stephanie Bloyd, Wichita Business Journal

**SUBSCRIBER CONTENT:** Sep 15, 2017, 5:00am CDT

Staff Wichita Business Journal

Source: Company representatives.

Rank	Name / prior *(not listed) / URL	Total number of retirement community units	Monthly cost per person	Number of Wichita-area employees	Services available	Administrator/	Human resources contact
1	<b>Bluestem Communities</b> 3001 Ivy Dr. North Newton, KS 67117 316-284-2900 bluestemks.org	485	475 - 750	434	Full-service restaurant onsite; wellness center with pool; college activities; admissions at adjoining campuses; some transportation; housekeeping; short-term rehabilitation.	James Krehbiel/	Jonathan Funk
2	<b>Larksfield Place Retirement Communities Inc.</b> 7373 E. 29th St. N Wichita, KS 67226 316-636-1000 larksfieldplace.org	189	1750 - 4930	120	Full-service restaurant and bar, bistro and market; fitness center with heated pool and personal trainers; exclusive access to five-star health care; accredited home health care; assisted living; short-term and outpatient rehabilitation and long term care; onsite banking; 24-hour security; housekeeping; maintenance; and computer support.	Reginald Hislop/	Ron Ratzlaff
3	<b>Maple Gardens Village</b> 10200 W. Maple Wichita, KS 67209	176	450 - 1095	5.0	Playing bridge; dominoes; exercise class; jigsaw puzzles;	Pat Lickess/	Ed Daigle

Rank	Name / prior *(not listed) / URL	Total number of retirement community units	Monthly cost per person	Number of Wichita-area employees	Services available	Administrator/	Human resources contact
	316-722-7960 maplegardens.rentourspace.com				and more. Week day Aging Projects Nutrition Lunches and bingo; monthly potlucks dinner and catered dinners. Grounds feature courtyards with streams, fountains and a private fishing lake. Three community rooms; exercise room; spa; wood shop; library; and complimentary laundry facilities. All-day Diamond Dining; housekeeping weekly; all utilities; basic cable; emergency pendent; transportation; valet parking; 24-hour staffing; rehab services; home health and private duty services onsite; massage therapist; beauty salon; manicurist; hearing doctor; foot doctor.		
4	<b>Sedgwick Plaza Senior Housing Community</b> 2455 N. Woodlawn Wichita, KS 67220 316-687-3741 sedgwickplaza.com	151	1825 - 4500	60		Terri Greaves/	Desire Scruggs
5	<b>Via Christi Village on Georgetown</b> 1655 S. Georgetown Wichita, KS 67218 316-685-0400 viachristi.org	146	2108 - 4175	10	Independent living and assisted living.	Jen Roberts/	Lynnae Craft
6	<b>Wichita Presbyterian Manor</b> 4700 W. 13th St. N Wichita, KS 67212 316-942-7456 wichitapresbyterianmanor.org	129	1110 - 3995	200	Independent living; assisted living; memory care; health care; and skilled rehabilitation.	Brad Radatz/	Lori Schartz
7	<b>Reflection Ridge Resort Lifestyle Communities</b> 2300 N. Tyler Rd. Wichita, KS 67205 316-721-0500 RLCommunities.com	119	2999 - 2999	35	Amenities include: three chef-prepared meals daily; weekly housekeeping; maintenance; all utilities except land-line phone; cable TV; activities; transportation.	Judy McGarvey/	Judy McGarvey

Rank	Name / prior *(not listed) / URL	Total number of retirement community units	Monthly cost per person	Number of Wichita-area employees	Services available	Administrator/	Human resources contact
8	<b>Grasslands Estates</b> 10665 W. 13th St. N Wichita, KS 67212 316-722-4817 holidaytouch.com	118	1649 - 3249	25	All-inclusive retirement living.	Sheila Stegink/	Sheila Stegink
9	<b>The Regent</b> 2050 N. Webb Wichita, KS 67206 316-631-3900 legendseniorliving.com	115	2300 - 4900	31	Independent living community offering restaurant-style dining; weekly housekeeping and linen services; daily life enriching activities and outings; maintenance; scheduled transportation for individual or group outings; utilities including electricity, gas, trash and water.	Sheila Cole/	Catherine Conner
10	<b>Carrington at Cherry Creek</b> 8200 E. Pawnee Wichita, KS 67207 316-684-0905 wtrcc.com	110	2090 - 3890	55	Assistance with ADLs; meals; housekeeping and laundry; numerous social activities.	Jessica Marberry/	Annie Law
11	<b>Prairie Homestead Senior Living</b> 1605 May Wichita, KS 67213 316-263-8264 prairiehomestead.org	100	1550 - 2255	35	Emergency call system; maintenance; housekeeping; laundry; mowing; snow removal; activities; chapel.	Diane Hull/	Diane Hull
11	<b>Shadyway Plaza Tower</b> 1421 N. Spruce Wichita, KS 67214 316-267-2500 pkmanagement.com	100	0 - 809	5.0	Onsite barber/beauty salon; exercise room; library/computer business room with Wi-Fi; pool table; and service coordinator.	Pamela Williams/	Kim Taylor
13	<b>Victoria Falls Assisted Living</b> 408 E. Central Andover, KS 67002 316-733-0334 wtrcc.com	96	2490 - 5500	45	Assistance with ADLs; three meals a day served restaurant style, plus snacks; activities.	Tom Broderick/	Annie Law
14	<b>The Oxford Grand</b> 3051 N. Parkdale Cir. Wichita, KS 67205 316-927-2007 oxfordatnewmarket.com	91	3025 - 6600	84	Senior living services.	Wayne Cash/	Heather Weaver
15		82		140		Bonni Tole/	

Rank	Name / prior *(not listed) / URL	Total number of retirement community units	Monthly cost per person	Number of Wichita-area employees	Services available	Administrator/	Human resources contact
	<b>LakePoint Wichita</b> 1315 N. West St. Wichita, KS 67203 316-943-1039 lakepointnc.com		2900 - 3860		Assistance with personal needs including dressing, bathing and dining; licensed nurse available; personal service plan; medication assistance, administration and management; personal care assistance available; ongoing monitoring of resident's health status; weekly housekeeping services; personal laundry services; three meals daily; room service available.		Lori Prothro
16	<b>Catholic Care Center</b> 6550 E. 45th St. N Bel Aire, KS 67226 316-771-6550 viachristi.org	76	1250 - 2100	25	Wellness opportunities; dining services; maintenance-free living; home health; spiritually nourishing environment. Independent living cottages; patio homes; assisted living; memory care; skilled nursing; 24-hour fitness room; stocked fishing pond; restaurant-style dining; beauty/barber shop.	Cindy LaFleur/	Mark Garriott
17	<b>Asbury Park</b> 200 S.W. 14th St. Newton, KS 67114 316-283-4770 asbury-park.org	67	502 - 1100	75	Assistance with ADLs; meals; housekeeping and laundry; activities.	Tom Williams/	Janet Fulmer
18	<b>Carrington House Central</b> 1432 N. Waco Wichita, KS 67203 316-262-5516 wtrcc.com	56	1990 - 3390	30	Maintenance-free cottages, duplexes and apartments; active educational, recreational, cultural, spiritual and social programming; full-service wellness center; salon;	Trina Tucker/	Annie law
19	<b>Presbyterian Manor of Newton</b> 1200 E. 7th St. Newton, KS 67114 316-283-5400 newtonpresbyterianmanor.org	54	580 - 2085	320		Marc Kessinger/	Sally Bender

Rank	Name / prior *(not listed) / URL	Total number of retirement community units	Monthly cost per person	Number of Wichita-area employees	Services available	Administrator/	Human resources contact
20	<b>Via Christi Village on McLean</b> 777 N. McLean Blvd. Wichita, KS 67203 316-942-7000 viachristivillages.org	36	995 - 1950	108	chapel; library; guest apartment; dining options; and coffee bar. 24-hour nursing staff; three meals a day; housekeeping; laundry; emergency call systems; restorative therapy program; shower or therapeutic tub bathing options; pastoral care. Outpatient and inpatient therapy services; outings; complimentary transportation to medical appointments; vast selection of amenities; 24/7 licensed nurse on duty; personal training and fitness classes; restaurant menu with a full-time baker; church services; and entertainment. Continuing care retirement community with independent living; assisted living; reflections memory care; and a skilled nursing home on campus.	Courtney Wolfe/	Michelle Russell
21	<b>Dove Estates Senior Living Community</b> 1400 S. 183rd St. W Goddard, KS 67052 316-550-6343 doveestates.com	24	2835 - 2835	50	Independent living provides a small and intimate home-like setting within a full continuum of care. Each cottage is located on ground level and faces a courtyard.	Jacqueline Jadidian/	Jacqueline Jadidian
22	<b>Park West Plaza</b> 505 N. Maize Rd. Wichita, KS 67212 316-729-4114 legendseniorliving.com	18	2500 - 2500	90	Independent living provides a small and intimate home-like setting within a full continuum of care. Each cottage is located on ground level and faces a courtyard.	Kelly Thomas/	Catherine Conner
23	<b>Medicalodges Goddard</b> 501 Easy St. Goddard, KS 67052	12	608 - 6630	85	Independent living apartments; assisted living; apartments; skilled nursing care;	Frank Dungan/	Ann Betzen

Rank	Name / prior *(not listed) / URL	Total number of Monthly retirement cost per community person units	Number of Wichita-area employees	Services available	Administrator/	Human resources contact
	316-794-8635 medicalodgesgoddard.com			therapy/rehabilitation services.		

From the Wichita Business Journal

[:https://www.bizjournals.com/wichita/subscriber-only/2017/07/07/assisted-living-facilities.html](https://www.bizjournals.com/wichita/subscriber-only/2017/07/07/assisted-living-facilities.html)

## The List

# KMH tops assisted living facilities list Ranked by Number of residents

Locally Researched by: Stephanie Bloyd, Wichita Business Journal

SUBSCRIBER CONTENT: Jul 7, 2017, 5:00am CDT Updated: Jul 7, 2017, 1:49pm CDT

Staff Wichita Business Journal

Source: Facility representatives.

Rank	Name / prior (*not ranked) / URL	Number of residents	Number of licensed beds	Minimum age to qualify	Monthly rent range	Services available	Top local executive, title/
1	<b>KMH</b> 402 S. Martinson Wichita, KS 67213 316-269-7500 kmh.org	110	118	55	3530 - 5660	Independent living; assisted living; memory care; skilled nursing and rehabilitation.	Matthew Bogner, CEO/
2	<b>Carrington at Cherry Creek</b> 8200 E. Pawnee Wichita, KS 67207 316-684-0905 wtrcc.com	109	110	18	2290 - 3890	Assist with ADLs; wide range of activities; large apartments.	Steven Herndon, resident director/
3	<b>Catholic Care Center</b> 6550 E. 45th St. N Bel Aire, KS 67226 316-771-6550 viachristi.org	105	100	62	3708 - 6590	Personalized nursing care; meals; housekeeping; laundry; and wellness programming.	Cindy LaFleur, executive director/
4	<b>Avita Rolling Hills Assisted Living and Memory Care</b> 629 S. Maize Ct. Wichita, KS 67209 316-361-2500 avitarollinghills.com	100	100	0.0	3250 - 5400	Onsite PA/MD; bus for activity outings; emergency pendants; 24-7 camera monitoring; door codes after hours; 24-7 nursing; on-call RN.	Mark Schulte, executive director/
5	<b>The Oxford Grand</b> 3051 N. Parkdale Cir. Wichita, KS 67205 316-927-2007 oxfordatnewmarket.com	87	90	0.0	3050 - 6625	We customize our services to meet a person's needs to live a purpose filled life.	Wayne Cash, community director/
6	<b>Victoria Falls Assisted Living</b> 408 E. Central Andover, KS 67002 316-733-0334 wtrcc.com	82	96	0.0	2590 - 4300	Assist with ADLs; medication management; three meals a day restaurant style; activities.	Tom Broderick, resident director/
7	<b>Regent Park Assisted Living and Memory Care</b> 10600 E. 13th St. N Wichita, KS 67206	74	83	0.0	3850 - 5730	Daily life enrichment activities; weekly housekeeping; three chef prepared meals; medication	Lorrie Britton, regional director of operations/

Rank	Name / prior (*not ranked) / URL	Number of residents	Number of licensed beds	Minimum age to qualify	Monthly rent range	Services available	Top local executive, title/
	316-337-5400 legendseniorliving.com					assistance; assistance with bathing, dressing/personal care.	
8	<b>Dove Estates Senior Living Community</b> 1400 S. 183rd St. W Goddard, KS 67052 316-550-6343 doveestates.com	73	80	0.0	4500 - 6400	24-7 licensed nursing on duty; complimentary transportation to medical appointments; contracted therapy that provides Part B and outpatient therapy services.	Jacqueline Jadidian, executive director/
9	<b>ComfortCare Homes</b> 7701 E. Kellogg Ste. 490 Wichita, KS 67207 316-685-3322 comfortcarehomeswichita.com	71	76	0.0	6500 - 7250	Premier dementia care for early to late stages. 24-hour personalized care in a residential environment.	Doug Stark, administrator/president/
10	<b>Wichita Presbyterian Manor</b> 4700 W. 13th St. N Wichita, KS 67212 316-942-7456 wichitapresbyterianmanor.org	70	72	65	3925 - 6130	Three meals a day; laundry and housekeeping; memory care services; medication management; emergency call system; scheduled transportation; staff availability 24-7.	Dawn Veh, executive director/
11	<b>Via Christi Village Ridge</b> 3636 N. Ridge Rd. Bldg 400 Wichita, KS 67205 316-462-3636 viachristi.org	70	60	50	3350 - 4695	Three nutritional meals a day; scheduled housekeeping and laundry; nursing staff on duty 24-hours a day; utilities (including cable TV and Wi-Fi).	David Bise, executive director/
12	<b>Larksfield Place Assisted Living</b> 2727 N. Rock Rd. Wichita, KS 67226 316-361-2800 larksfieldplace.org	68	72	0.0	4950 - 6425	Short-stay/transitional care; 24-hour nursing staff; concierge services; onsite therapy programs; recreation/fitness activities; social services (MSW); restorative care.	Reginald Hislop, CEO/president/
13	<b>Bluestem Communities</b> 3001 Ivy Dr. North Newton, KS 67117 316-284-2900 bluestemks.org	64	70	0.0	3585 - 6000	Assisted living facility with a full-service restaurant onsite; wellness center with pool; college activities; admissions at adjoining campuses; some transportation; housekeeping; short-term rehabilitation.	James Krehbiel, CEO/
14	<b>LakePoint Wichita</b> 1315 N. West St. Wichita, KS 67203 316-943-1039 lakepointnc.com	63	80	0.0	2950 - 5500	Medications management; 24-hour nursing; dining services; life enrichment.	Bonni Tole, administrator/
15	<b>Via Christi Village on Georgetown</b> 1655 S. Georgetown Wichita, KS 67218	56	68	0.0	3196 - 4241	24-hour gated, secure community; complete kitchens with electric stove, full-size refrigerator and dishwasher; emergency call	Kelly Thomas, executive director/

Rank	Name / prior (*not ranked) / URL	Number of residents	Number of licensed beds	Minimum age to qualify	Monthly rent range	Services available	Top local executive, title/
	316-685-0400 viachristi.org <b>Glen Carr House Memory Care</b>					system; exercise classes; fun activities.	
16	1433 N. Hamilton Dr. Derby, KS 67037 316-788-9999 GlenCarrHouse.com	53	56	0.0	4500 - 7000	Memory care.	Keith Frymire, executive director/
	<b>Carrington House Central</b>						
17	1432 N. Waco Wichita, KS 67203 316-262-5516 wtrcc.com	52	60	18	1890 - 3890	Emergency call; assist with ADLs; three meals daily; activities.	Trina Tucker, operator/
	<b>Park West CCRC</b>						
18	505 N. Maize Rd. Wichita, KS 67212 316-729-4114 legendseniorliving.com	51	72	0.0	3350 - 5780	Daily life enrichment activities; weekly housekeeping; three chef prepared meals; medication assistance; assistance with bathing, dressing and other personal care.	Kelly Thomas, residence director/
	<b>Via Christi Village on McLean</b>						
19	777 N. McLean Blvd. Wichita, KS 67203 316-942-7000 viachristivillages.org	48	54	0.0	3400 - 3995	Three nutritional meals a day; scheduled housekeeping and laundry; 24-hour nursing staff; utilities (including cable TV, but not phone); life enrichment activities.	Courtney Wolfe, executive director/
	<b>Asbury Park</b>						
20	200 S.W. 14th St. Newton, KS 67114 316-283-4770 asbury-park.org	48	48	55	502 - 8700	Independent living rental cottages and patio homes; rapid recovery; assisted living; memory support; 24-hour skilled nursing services; child care.	Tom Williams, CEO/
	<b>Presbyterian Manor of Newton</b>						
21	1200 E. 7th St. Newton, KS 67114 316-283-5400 newtonpresbyterianmanor.org	45	46	65	3105 - 4120	Assisted living and memory care neighborhoods with active programming; 24-hour nursing; wellness center; BBET therapies; on-campus preschool.	Marc Kessinger, executive director/
	<b>Brookdale East Wichita</b>						
22	9191 E. 21st St. N Wichita, KS 67206 316-630-0788 brookdaleliving.com	37	39	0.0	5035 - 6500	Memory care.	Darcy Bluma, executive director/
	<b>Via Christi Village on North Broadmoor</b>						
23	1240 N. Broadmoor Wichita, KS 67206 316-636-5101 viachristi.org	35	39	0.0	3500 - 4500	24-hour nursing staff; emergency call system; life enrichment activities; scheduled housekeeping and laundry; three nutritious meals a day; wellness monitoring; 24-hour security.	Kevin Frymire, administrator/
	<b>Derby Assisted Living</b>						
24	719 Klein Cir. Derby, KS 67037	31	35	0.0	3400 - 3400	Assistance with household chores and daily living activities; 24-7 health services; full dining; wide	Albert Cocchetella, executive director/

Rank	Name / prior (*not ranked) / URL	Number of residents	Number of licensed beds	Minimum age to qualify	Monthly rent range	Services available	Top local executive, title/
	316-260-4447 derbyassistedliving.com					range of organized activities.	
24	<b>LakePoint Augusta</b> 901 LakePoint Dr. Augusta, KS 67010 316-775-6333 lakepointnc.com	31	35	0.0	2950 - 5500	Medication management; 24-hour nursing; dining; life enrichment,	Kay Wentworth, regional director of sales and marketing/
26	<b>Prairie Homestead Senior Living</b> 1605 May Wichita, KS 67213 316-263-8264 prairiehomestead.org	30	30	62	2681 - 3446	Emergency call system; 24-hour nursing services; walk-in showers; all meals; weekly laundry/housekeeping/linen; flexible restaurant style dining; activities; outings.	Diane Hull, administrator/
27	<b>Sedgwick Plaza Senior Housing Community</b> 2455 N. Woodlawn Wichita, KS 67220 316-687-3741 sedgwickplaza.com	29	35	60	2600 - 4650	Month-to-month rental; studio, one-and two-bedroom apartments each with a kitchenette; three meals per day served restaurant-style; weekly housekeeping; linen service and weekly laundry.	Terri Greaves, executive director/
28	<b>LakePoint El Dorado</b> 1313 S. High El Dorado, KS 67042 316-320-4140 lakepointnc.com	29	32	0.0	2950 - 5500	Medications management; 24-hour nursing; dining services; life enrichment.	Christie Underwood, administrator/ Kay Wentworth, regional director sales and marketing/
29	<b>Medicalodges Goddard</b> 501 Easy St. Goddard, KS 67052 316-794-8635 medicalodgesgoddard.com	21	25	0.0	2172 - 2326.5	Meals; laundry; free TV network; medication passing.	Frank Dungan, administrator/
30	<b>Colwich Gardens</b> 300 E. Chicago Colwich, KS 67030 316-260-1034 colwichgardens.com	17	22	NA	3200 - 4600	24-7 certified staff; three home-cooked meals; light housekeeping; laundry; emergency call system; daily activities.	Jane Schauf, director of nursing/

From the Wichita Business Journal

[:https://www.bizjournals.com/wichita/subscriber-only/2017/12/29/largest-nursing-home-facilities-in-the.html](https://www.bizjournals.com/wichita/subscriber-only/2017/12/29/largest-nursing-home-facilities-in-the.html)

## The List

# Largest Nursing Home Facilities in the Wichita Area Ranked by Number of licensed beds

Locally Researched by: **Stephanie Bloyd, Wichita Business Journal**

**SUBSCRIBER CONTENT:** Dec 29, 2017, 5:00am CST

Staff *Wichita Business Journal*

Source: Company representatives.

Rank	Name / prior (* not ranked) / URL	Number of licensed beds	Number of residents	Monthly rent	Services available	Administrator/	Human resources contact
1	<b>Catholic Care Center</b> 6700 E. 47th St. N Bel Aire, KS 67226 316-770-2020	176	165	Provided at admission	Post-acute-skilled care; physical, occupational and speech therapy seven days per week; chaplain services and spiritual services daily.; daily physician and mid-level providers on-site; activities; restorative services; home care and hospice provided with community partners; dental and podiatry provided on-site; transportation to medical appointments and other events.	Cindy LaFleur/Kate Pentz/	Ned Woodward
2	<b>Bluestem Communities</b> 3001 Ivy Dr.	154	153	\$7,000-\$8,300	Dementia care; post-acute	James Krehbiel/	Jonathan Funk

Rank	Name / prior (* not ranked) / URL	Number of licensed beds	Number of residents	Monthly rent	Services available	Administrator/	Human resources contact
	North Newton, KS 67117 316-284-2900 bluestemks.org				skilled rehab; life enrichment; restaurant; and wellness center. Long-term care; respite care; skilled nursing and rehabilitation; memory care on a secure unit; private and semi-private rooms; Medicare; Medicaid; managed care; private funds and private insurance accepted.		
3	<b>Sandpiper Healthcare &amp; Rehabilitation Center Inc.</b> 5808 W. 8th St. Wichita, KS 67212 316-945-3606 Sandpiperhrc.com	135	125	\$5,890 - \$7,409		Melissa Lang/	Erica Reese
4	<b>LakePoint Wichita</b> 1315 N. West St. Wichita, KS 67203 316-943-1039 lakepointnc.com	110	97	Varies	Skilled nursing; assisted living; and independent living.	Bonni Tole/	Lori Prothro
5	<b>KMH</b> 402 S. Martinson Wichita, KS 67213 316-269-7500 kmh.org	109	94	Varies	Long-term care; skilled; nursing; rehabilitation.	Matthew Bogner/	Caryn Clothier
6	<b>Asbury Park</b> 200 S.W. 14th St. Newton, KS 67114 316-283-4770 asbury-park.org	101	100	\$7,502	24-hour skilled nursing services; memory support; independent living rental cottages; patio homes; rapid recovery; assisted living.	Tom Williams/	Janet Fulmer
7	<b>LakePoint Augusta</b> 901 LakePoint Dr. Augusta, KS 67010 316-775-6333 lakepointnc.com	100	79	Varies	Skilled nursing; assisted living.	Alejandro Nieto/	Lori Prothro
8	<b>Regent Park Rehabilitation and Healthcare</b> 10604 E. 13th St. N	84	73	Varies	Long-term care and skilled nursing; rehabilitation for	Michail Loyd/	Elizabeth Lawless

Rank	Name / prior (* not ranked) / URL	Number of licensed beds	Number of residents	Monthly rent	Services available	Administrator/	Human resources contact
	Wichita, KS 67206 316-337-5450 regentparkrehab.net				short-stay rehabilitation.		
9	<b>Larksfield Place Health Care Center</b> 2828 N. Gouverneur Wichita, KS 67226 316-636-1111 larksfieldplace.org	83	79	\$293 (private); \$336 (XL private, per day)	Personalized care as needed from OT, PT and speech therapists; skilled nursing and long-term care; dietitians and nutritionists; on-site pharmacy, art, music and recreation. Specialized rehabilitation (physical, speech, occupational therapy); skilled nursing, including wound care; IV antibiotics; complex medical care; palliative care or collaboration with hospice.	Vanessa Underwood/	Ron Ratzlaff
10	<b>Reeds Cove Health and Rehab</b> 2114 N. 127th Ct. E Wichita, KS 67206 316-500-8800 reedscovehealthandrehab.com	80	74	Starting at \$6,660	Skilled nursing, including wound care; IV antibiotics; complex medical care; palliative care or collaboration with hospice.	Vanessa Underwood/	Kathi Bragg
11	<b>Victoria Falls Skilled Nursing and Rehabilitation</b> 224 E. Central Andover, KS 67002 316-733-0654 wtrcc.com	78	72	\$6,600	Skilled nursing; physical, occupational and speech therapies; long-term and short-term rehab.	Tiffany Hoffman/	Annie Law
12	<b>ComfortCare Homes Inc.</b> 7701 E. Kellogg Ste. 490 Wichita, KS 67207 316-685-3322 comfortcarehomeswichita.com	77	73	\$6,500-\$7,250	Dementia care.	Doug Stark/	Brooke Bowlin
13	<b>Derby Health and Rehabilitation</b> 731 Klein Cir. Derby, KS 67037 316-719-2400 derbyhealthandrehab.com	74	70	\$6,500 (varies)	Skilled nursing; long-term care.	John Brand/	Kathi Bragg

Rank	Name / prior (* not ranked) / URL	Number of licensed beds	Number of residents	Monthly rent	Services available	Administrator/	Human resources contact
14	<b>Family Health &amp; Rehabilitation Center</b> 639 S. Maize Ct. Wichita, KS 67209 316-425-5600 familyhealthrehab.com	72	70	\$260 per day	Skilled nursing; long-term care.	Vicky Gooch/	Kathi Bragg
15	<b>LakePoint El Dorado</b> 1313 S. High El Dorado, KS 67042 316-320-4140 lakepointnc.com	65	56	Varies	Skilled nursing; assisted living.	Christie Underwood/Kay Wentworth/	Lori Prothro
16	<b>Presbyterian Manor of Newton</b> 1200 E. 7th St. Newton, KS 67114 316-283-5400 newtonpresbyterianmanor.org	60	59	Starting at \$211 per day	Full-service long-term care in three neighborhoods with one for memory care; PATH short-term rehab program; active social, spiritual, intergenerational and wellness programming with day trips and on-site preschool; salon; wellness center; library; chapel. Rehab; skilled nursing; IV therapy; full nursing care.	Marc Kessinger/	Emily Trask
17	<b>Medicalodges Goddard</b> 501 Easy St. Goddard, KS 67052 316-794-8635 medicalodgesgoddard.com	60	51	\$5,362	Campus includes independent living, assisted living and skilled nursing.	Frank Dungan/	Ann Betzen
18	<b>Wichita Presbyterian Manor</b> 4700 W. 13th St. N Wichita, KS 67212 316-942-7456 wichitapresbyterianmanor.org	50	50	\$7,980 (private room); \$7,200 (semi-private room)	24-hour nursing care (including bathing, toileting, eating and dressing, as needed); three daily meals, plus healthy between-meal snacks; daily housekeeping and laundry;	Kate Pentz/	Lori Schartz

Rank	Name / prior (* not ranked) / URL	Number of licensed beds	Number of residents	Monthly rent	Services available	Administrator/	Human resources contact
19	<b>Brookdale East Wichita</b> 9191 E. 21st St. N Wichita, KS 67206 316-630-0788 brookdaleliving.com	40	40	\$6,100 average	restorative nursing services; 24-hour security; activities, events and social programs; individualized care planning; medication management; interfaith spiritual services; transportation to scheduled activities. All stages of memory care, from early stages to end-of-life.	Darcy Bluma/	Donna Brummett
20	<b>Park West Plaza</b> 505 N. Maize Rd. Wichita, KS 67212 316-729-4114 legendseniorliving.com	40	24	Varies	Continuing care retirement community with independent living; assisted living; reflections memory care; and a skilled nursing home on campus. 24-hour nursing staff; three meals a day; daily housekeeping and laundry service; emergency call system; therapeutic tub bathing options; pastoral care.	Kelly Thomas/	Elizabeth Lawless
21	<b>Via Christi Village on McLean</b> 777 N. McLean Blvd. Wichita, KS 67203 316-942-7000 viachristivillages.org	36	34	\$244 - \$295		Courtney Wolfe/	Michelle Russell



# The Five-Year Senior Housing Development Forecast

Partly Cloudy, With Sunny Skies Ahead

## Senior housing operators, owners and developers have long spoken hopefully about the upcoming “Silver Tsunami,” or the rapid aging of the U.S. population based on the baby boom.

Specifically, it’s believed that as the country’s approximately 74 million baby boomers age, more Americans than ever will turn to senior living communities for their housing and care needs – and the senior housing industry will experience its highest demand in history.

What some in the industry fail to consider, however, is that this “Silver Tsunami” probably won’t start impacting the senior housing space for at least 10 years.

That’s because individuals belonging to the baby boomer generation were born between 1946 and 1964, which means that now, in 2018, baby boomers are between 54 and 72 years old. At 72, today’s oldest boomers are still several years away from moving into independent living and assisted living communities. According to the American Seniors Housing Association, the average age of a senior living resident (including independent living and assisted living) is 84. If you look specifically at assisted living, 87 is the average age, a full 15 years older than our boomers.

By 2030, **20%** of the U.S. population will be **65 years old or older.**

Source: U.S. Census Bureau

Owners and developers will have to wait several more years until the U.S. demographics are truly in their favor. Indicators point to several key headwinds in the meantime, but market participants can proactively navigate these opportunities for their benefit until the true aging boom takes hold.

This white paper will cover three key predictions that will drive the market in the near term.

*The number of Americans who are 85 years old or older is expected to **more than double** between 2020 and 2040.*

Source: An Aging Nation: The Older Population in the United States Population Estimates and Projections Current Population Reports Issued May 2014 P25-1140 By Jennifer M. Ortman, Victoria A

## PREDICTION #1:

### New construction growth will slow.

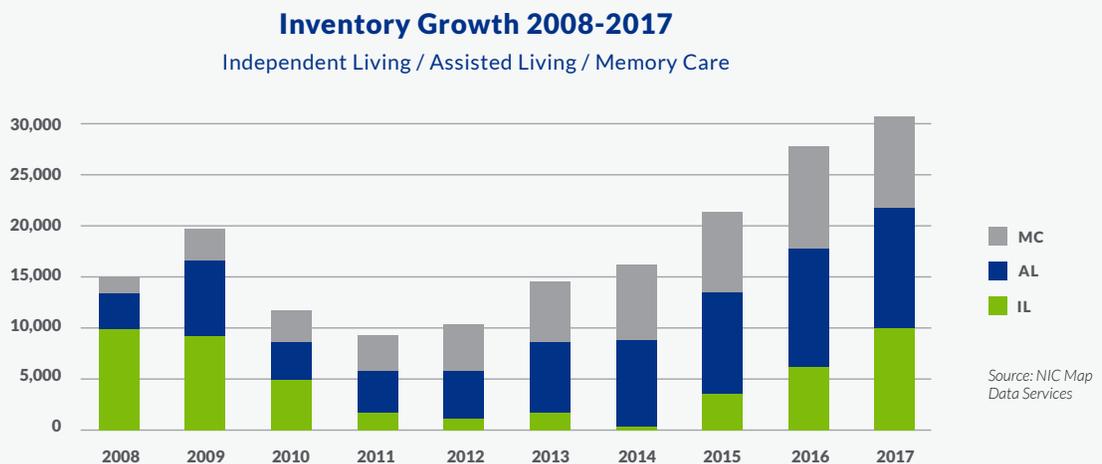
Senior housing developers have been busy since the Great Recession ended in 2009. In fact, approximately 20% of the current U.S. senior housing inventory was brought to market during the last five years, according to the National Investment Center for Seniors Housing & Care (NIC).

The next five years are likely to see a slowdown in new construction. The insatiable desire of owners and operators to grow during the economic recovery has created pockets of oversaturation in certain markets, as well as significant struggles to absorb all of the shiny, new product.

“We’re seeing occupancy issues across some markets,” says Jamie Timoteo, senior vice president of Plante Moran Living Forward. “We expect this to continue into the foreseeable future with a reduction in new construction because there have been so many new units added across the country.”

Economic factors could also lead to additional slowdown.

“Some of the lulls in growth may be tied to the economy, too,” says Dana Wollschlager, partner and practice leader at Plante Moran Living Forward. “If interest rates go up and we continue to see a tight labor market, in addition to the continued escalation in construction prices, new developments could come online more slowly.”



## Quality concerns

**Construction quality:** Not all new product is good product, Wollschlager notes. Hastily built communities and work done by developers who are new to the senior living space can cause problems for even the most experienced senior housing owners and operators.

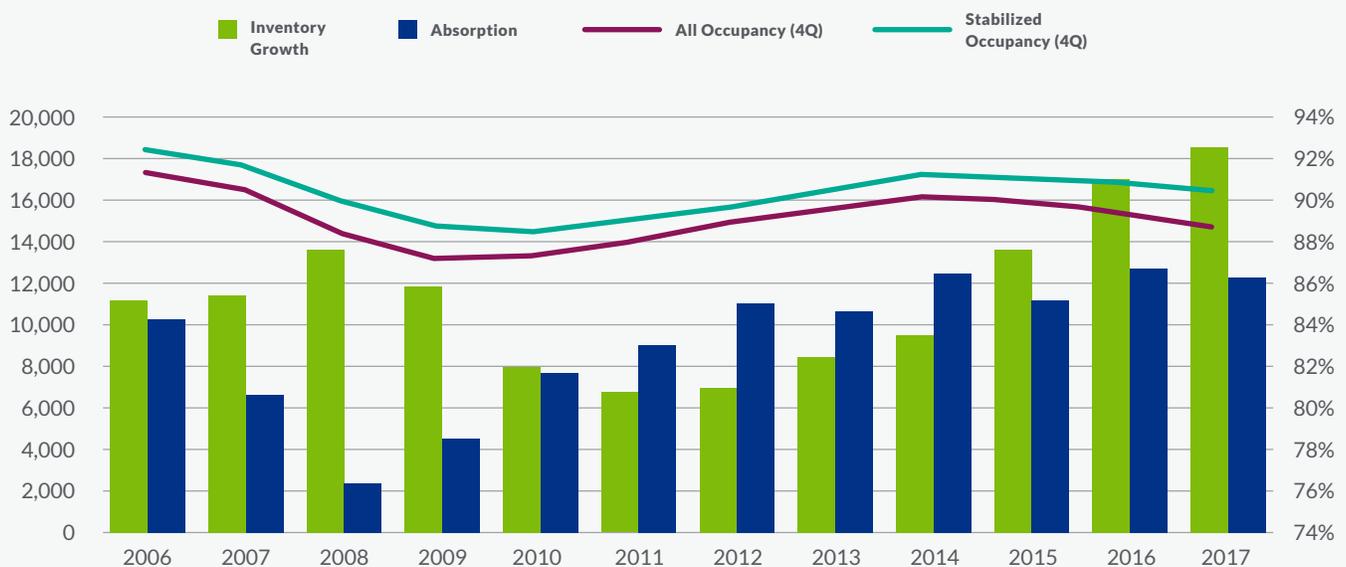
“You can define ‘bad product’ as a very cheaply put-together building,” Timoteo adds.

“Cosmetically, it may look okay, but wear and tear shows quickly.”

Buildings that were constructed in haste or with low-quality materials will likely require a great deal of new capital investment within five to 10 years, he says. With upkeep that is not financially viable, these communities may not last very long in certain markets – even when experienced operators are involved.

**Operator quality:** Widespread concern has emerged related to new senior housing operators entering the industry over the past five years and their lack of experience in operating the healthcare component of senior living successfully.

### Occupancy Rates Have Slipped in the Last Three Years



Source: NIC MAP® Data Service

**“You might see a temporary impact on good operators until people start moving to where the quality of care is better.”**

Jamie Timoteo  
Senior Vice President, Plante Moran Living Forward

“You can have a decent project, but the operator may not have the experience to run the building well,” Wollschlager says. A poor operator can’t save even a pristine building if it doesn’t attract and retain a strong resident base and staff.

“There are a large number of new operators and developers building brand new senior housing products that are, from a building standpoint, beautiful,” Timoteo says. “They have all of the bells and whistles and they look great, but when a resident actually moves in, service is sub-par.”

In the short term, those new operators that aren’t providing quality care may impact the existing communities’ ability to draw new residents to their doors.

“You might see a temporary impact on good operators until people start moving to where the quality of care is better,” Timoteo says.

## **PREDICTION #2:**

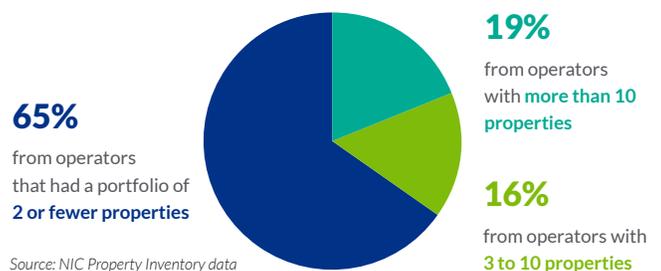
### **Cloudy skies will continue—short term.**

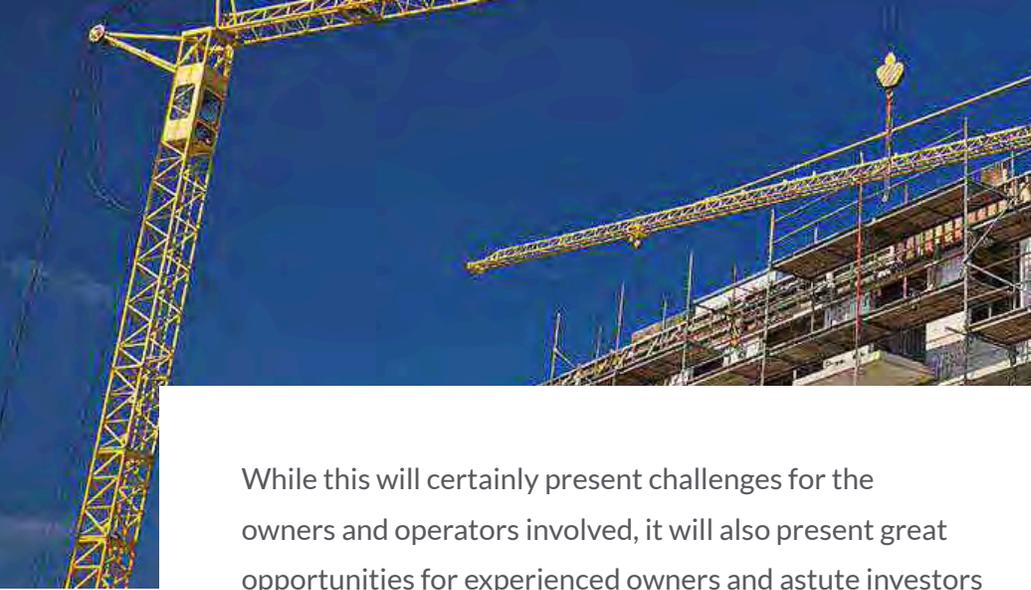
Now that several years have passed following the post-recession construction boom, the senior housing industry is on the cusp of some short-term project failures.

More than half of the new entrants in the senior living marketplace have experience operating just two or fewer communities, according to NIC. Because of this, the next three years are likely to include some senior living communities going belly-up. In addition to inexperienced operators, several financial and economic pressures — from inflation and increasing interest rates to the ongoing senior housing staffing crisis — could exacerbate these failures.

#### **New Entrants to Senior Living:**

From 4Q2014 to 4Q2017, the senior living industry added **992 new properties** to the MSAs that NIC tracked in 2014.





**“If assisted living units don’t fill, what can we replace them with? What is the market telling us the units should be?”**

Dana Wollschlager  
*Partner and Practice Leader, Plante Moran  
Living Forward*

While this will certainly present challenges for the owners and operators involved, it will also present great opportunities for experienced owners and astute investors to grow. According to the 39th annual Emerging Trends in Real Estate report from the Urban Land Institute and PricewaterhouseCoopers, out of all residential property types, senior housing was identified as having the best prospects for both development and investment in 2018 and beyond.

“Those operators and investors that are nimble, flexible and can pounce on opportunities as they become available will be the long-term success stories in the future,” Wollschlager says.

### **PREDICTION #3:** **A repositioning boom is in store.**

Long-term growth will come in the next five years and beyond, but given recent overheating in some markets, short-term growth likely will not come in the form of new construction.

Instead, growth will come from the repositioning of existing senior housing assets to better meet the needs of consumers. For instance, majority assisted living providers may have to reexamine their care offerings to meet the needs of the current demographic, which may skew more toward independent living, assisted living “light” or memory care.

“If assisted living units don’t fill, what can we replace them with?” Wollschlager explains. “What is the market telling us the units should be?”



## 1.8 Million

There are 1.8 million senior housing units in the market, and skilled nursing beds account for 49% of that total.

Source: NIC Map

By studying a market further, a struggling property can assess whether unit conversions are in order, or if a new strategy will help turn distress into success.

The skilled nursing community type is particularly ripe for being repositioned in the next few years in order to better target current consumers.

There are currently 1.8 million senior housing units or beds in the markets tracked by NIC. Skilled nursing beds account for 883,000 of that total or 49% of the existing senior housing inventory.

“Typically, the skilled nursing product type is not attractive to the consumer of today or tomorrow, so we anticipate that there will be a large number of repositioning projects that take place in the next several years,” Timoteo says. “Operators will look to reduce the number of skilled nursing beds in their portfolios and replace those units with more independent living, assisted living or memory care units to meet consumers’ demands.”

This has already been occurring; the number of skilled nursing beds in the U.S. has been reduced every year since 2008, with the exception of 2010 and 2013.

Companies that are looking to reposition should be aware of potential rising costs. After all, the cost of construction is increasing, so this is a strategy not to be taken without some caution.

## Cost per Gross Square Foot for Mid-Level Senior Housing Project—2018 vs 2017

	JANUARY 2018	JANUARY 2017
Cost of Mid-Level Assisted Living Projects	\$170 - \$212	\$158 - \$210
Cost of Mid-Level Independent Living Projects	\$141 - \$171	\$130 - \$167

Source: The Weitz Company

As of January 2018, the cost of mid-level assisted living projects varied from \$170 per gross square foot to \$212 per gross square foot, depending on the project's location and the building materials utilized, according to an analysis by the Des Moines, Iowa-based construction firm The Weitz Company. Mid-level independent living projects, meanwhile, cost between \$141 and \$171 per gross square foot.

By comparison, in January 2017, mid-level assisted living projects ranged in price between \$158 and \$210 per gross square foot, while independent living projects varied between \$130 and \$167 per gross square foot — an increase of roughly 7% to 8% year-over-year for both property types.

The noteworthy jump in cost can be attributed, in part, to both an ongoing labor shortage in the construction sector and rising lumber prices. Senior living developers nationwide should keep these costs, and their potential to rise, in mind as they embark on repositioning projects that require renovations or new construction.

### Making the most of the next five years

The number of recently built new properties will certainly increase the occupancy pressures in the near future. This may result in a short-term difficulties for the senior living industry. When looking to the future, however, playing the long game appears to have the wind at its back. While the demographic boom may still be 10 years away, there are ample opportunities for senior living owners and operators to succeed in the meantime and prepare for the aging wave ahead.

Plante Moran Living Forward™ provides fully integrated strategic, financial, operational, and development advisory services by a single team that has spent decades finding solutions that increase the quality and places of care for seniors.

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## Plante Moran Living Forward

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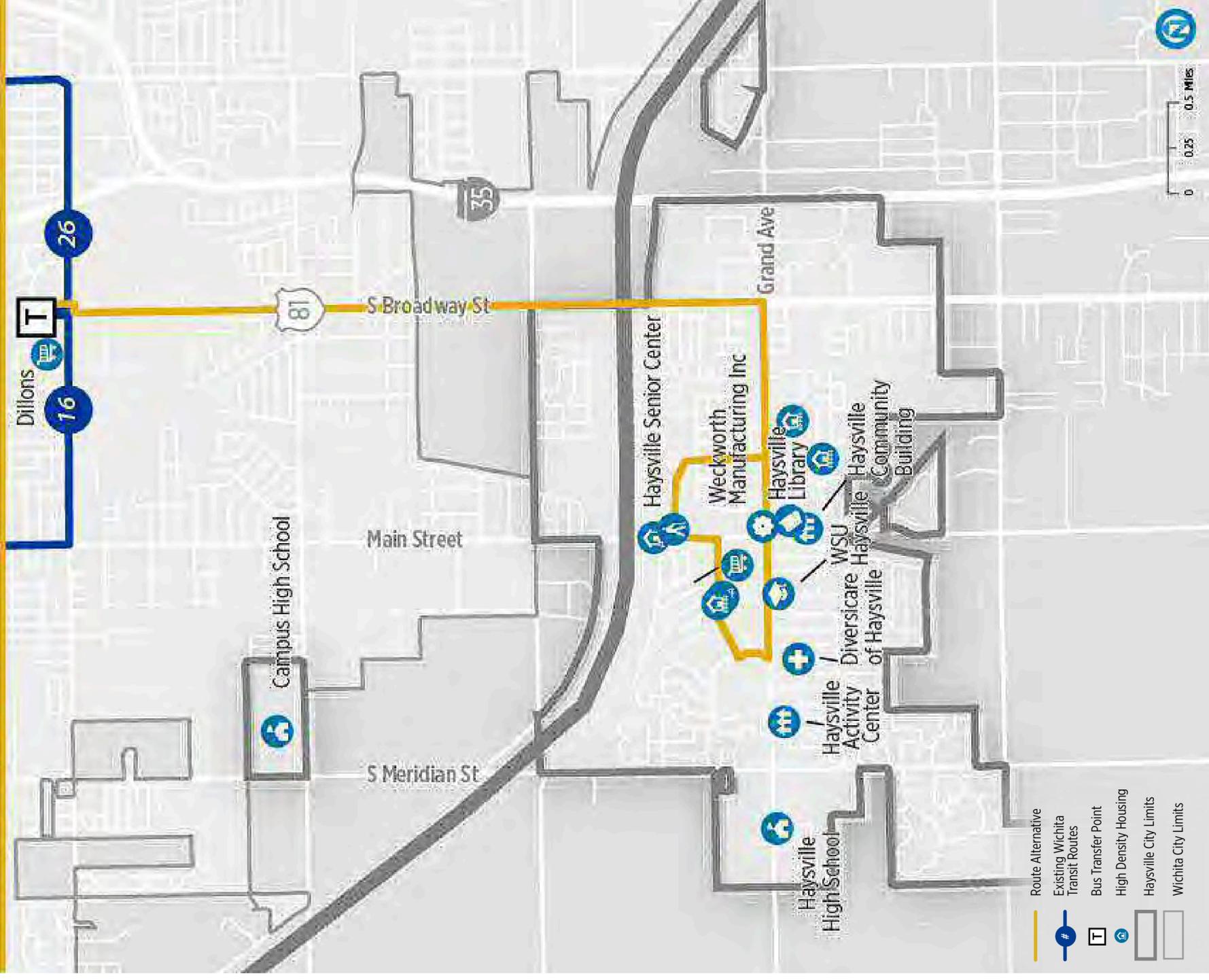


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# HAYSVILLE TRANSIT SERVICE CONCEPTS

**Haysville Alternative 1: Wichita connection via Broadway St**



**Alternative 1:**

Route Purpose: To serve many of Haysville's travel destinations and provide a connection to Wichita Transit.

Wichita Transit Connection	Route 16 & 26
Type of Service	Feeder
Frequency	30 minutes
Vehicle Type	14-seat van

**Alternative 2:**

Route Purpose: To provide a connection between Derby, Wichita, and Haysville, as well as provide a connection to Wichita Transit.

Wichita Transit Connection	Route 16, 23 & 26
Type of Service	Feeder & Connector
Frequency	60-120 minutes
Vehicle Type	14-seat van or 32-seat bus

**Derby-Haysville Alternative 2: Inter-city connection and Wichita connection**

