

Innovating Workforce Solutions

Driving the future of senior living



TALA

Assisted Living's Voice in Texas

Speakers:

Heather Tussing • President, The Aspenwood Company

Matt Strange • COO, Procare HR

Kimberly Varley • VP of Human Resources, The Aspenwood Company

Anna Callender • VP of Operations, The Aspenwood Company

THE
ASPENWOOD
COMPANY

procare^{HR}
caring for people who care for people.

Who is The Aspenwood Company?



Heather Tussing
President



Anna Callendar
VP Operations



Kimberly Varley
VP HR

THE ASPENWOOD COMPANY

Luxury Portfolio: 7 Communities

TEXAS, TENNESSEE, NORTH CAROLINA

Mid-Market Portfolio: 13 Communities

HOUSTON, AUSTIN, NW ARKANSAS, NORTH DALLAS



19

Operating
Communities

(1 Add'l Under Construction)

1, 500+

Team
Members

2, 800+

Apartment Homes

1,247

Independent
Living Units

1, 135

Assisted Living
Units

424

Memory Care
Units

11%

YoY Reduction In
Turn Over

6X Great Place to Work
5X Best Places to Work
Fortune | Aging Services

35%

YoY NOI Growth

Who is Procure HR?

Procure HR exclusively serves Senior Care and Disability Services providers, focusing on leveraging people and people related functions to drive measurable business results.



Managed HR for Senior Care



THIS IS ALL WE DO
We hire seasoned leaders with a passion for the industry. Everything we do is built for Senior Care.



MEDIUM TO ENTERPRISE
Unlike other HR Services, our model is built to handle large care operations with 250-10,000 employees.



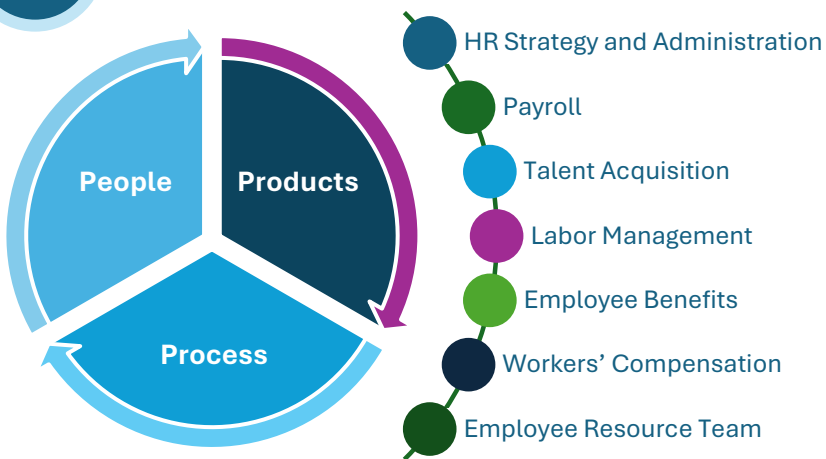
Comprehensive HR Model
Comprehensive HR services engineered to integrate and drive strategy/execution in Senior Care.



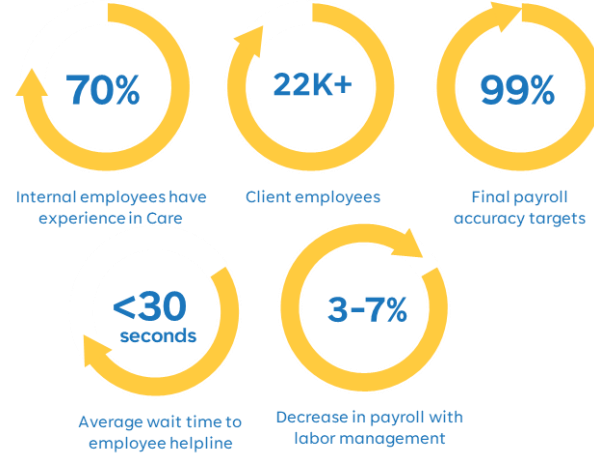
TECH FOR CARE PROVIDERS
Our technology is built to ensure scheduling, time and attendance, reporting, and functionality meets our clients' needs.



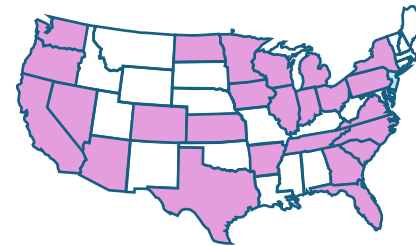
OUR SERVICES



WHAT SETS US APART



SERVING CLIENTS LOCALLY



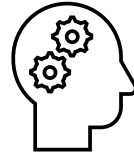
- Procure is a national firm, with Senior Care communities in 28+ states
- Procure has team members throughout the country to provide localized expertise and experience to our clients
- Procure is fortunate to have best in class capital partners supporting continued investment into our service model:





"If you don't know where you are going, you might wind up someplace else." – Yogi Berra

What is Labor Management?



Electronic, Customizable Scheduling

- **Visibility to schedules:** Built in ability to pick up and swap shifts, visibility to future data
- **Variance Reporting:** See where staffing is over and under, in real-time
- **Worked, Not Scheduled Reporting**
- **Missed Punch Reporting**
- **Continuous Innovation:** Stay ahead with constant improvements to meet operational needs and tech trends.

Workforce Analytics

- **Advanced Predictive Insights:** Leverage leading indicators and predictive analytics for smarter decisions.
- **Real-Time Budget Tracking:** Monitor your budget daily, weekly, by payroll, and monthly and as census changes.
- **Proactive Decision-Making:** Use data-driven strategies to influence results proactively.
- **Customized Notifications:** Tailor performance tracking and alerts to your specific needs.
- **Integrated Data Reporting:** Consolidate multiple inputs (HRIS, EMAR, Scheduling) into cohesive reports.
- **Key Trend Insights:** Access crucial trend reporting to guide your operations.

Customized Partnership Solutions

- **Tailored Partnership Solutions:** Collaborate with technology experts ready to address and resolve challenges swiftly.
- **Industry-Leading Expertise:** Benefit from leadership that understands your position, offering customized strategies for every community.
- **Measurable Labor Management:** Achieve measurable results with targeted labor management interventions.
- **Scalable Solutions:** Enhance operational efficiency with the flexibility to scale as your community's needs evolve

How does it work?

DAILY

- KPI dashboard delivered via email
- Labor process and scheduler training to ensure deep knowledge and understanding
- Notifications of outliers (late clock-in, clock in, not scheduled, early departure)
- Staffing based on budget, needs and census changes

WEEKLY

- Virtual coaching session with labor strategy team
- Identification of most important KPI's to drive performance.
- Accountability to prior week commitments
- Weekly trending report
- Partnership with TA to identify key position openings

MONTHLY

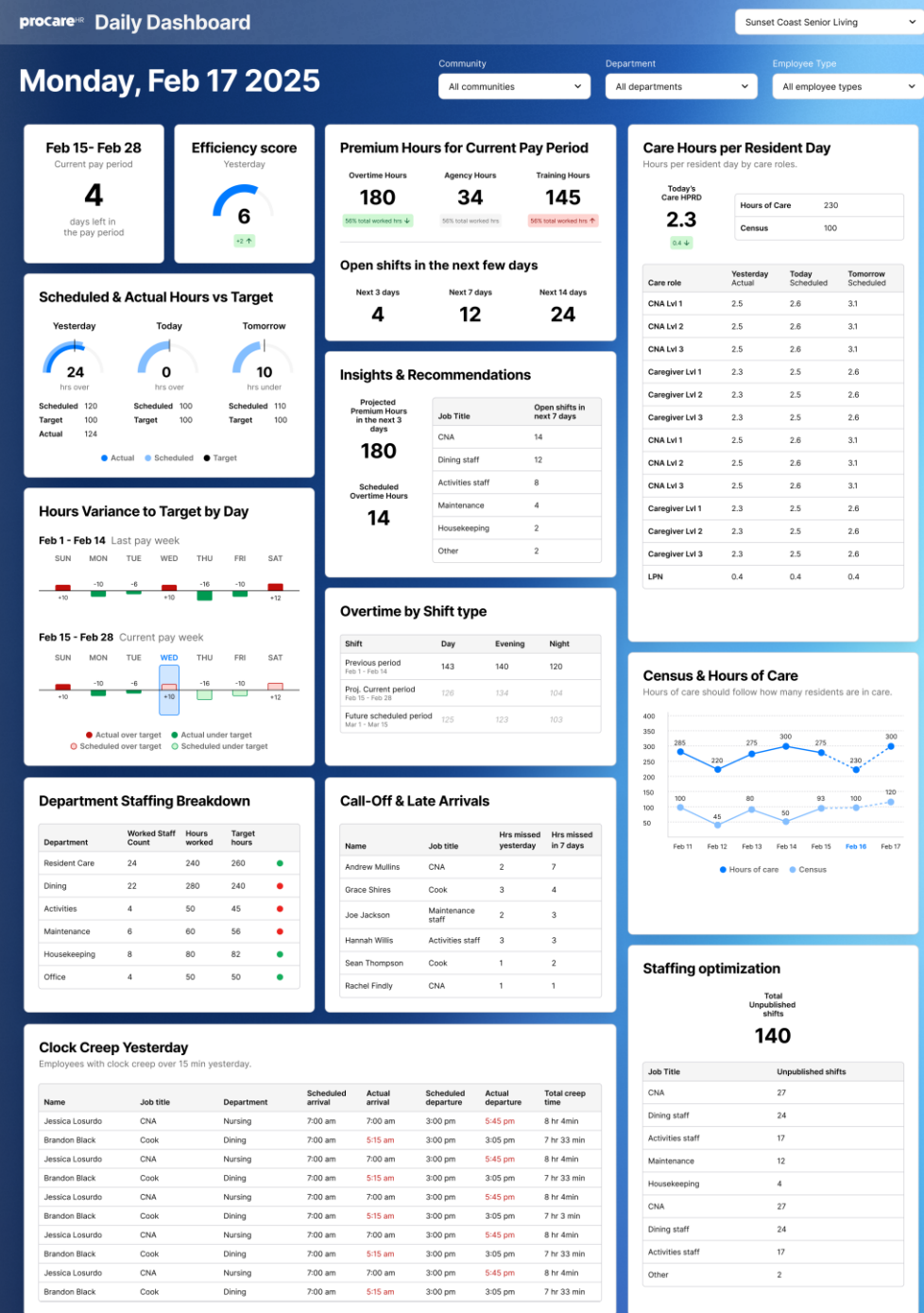
- Payroll pulse delivered each payday
- Identification of trends and improvement opportunities
- Partnership with interdisciplinary team to identify improvement opportunities

Data-Driven Coaching

How do we go from "reporting the news" to "changing the news"

Data from Payroll and Scheduling feed into single dashboard

Uncover hidden and future drivers of labor spend



Dashboard example

Today's Date: 04/02/2025



***The information presented in this scorecard reflects current trends and serves as a general guide to forecast potential directions. Please note that the data is subject to change based on updates and modifications within the scheduling system. For the most accurate and up-to-date information, regularly consult the latest data available.*

Week Start Date
03/31/2025

Week End Date
04/06/2025

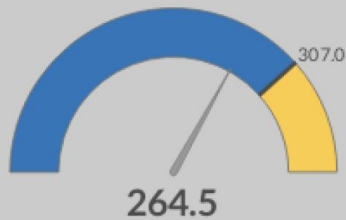
Hours Worked Last Week



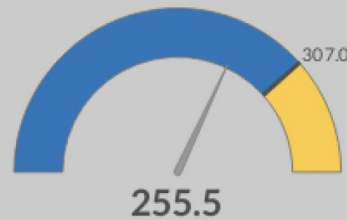
Hours Scheduled This Week



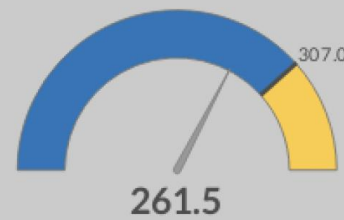
Hours Worked | Yesterday



Hours Scheduled | Today



Hours Scheduled | Tomorrow



Training Hours | This Week

28.0

New Team Members | This Week

0

Hours Called Off | This Week

0

Terminated Team Members | This Week

0

Dashboard example

Open Shifts Next:	3 Days 5	7 Days 38	14 Days 108	30 Days 265
FTEs Needed to Cover Opens	3 Days 1.33	7 Days 6.29	14 Days 8.80	30 Days 9.89

Overtime | This Week (Worked and Scheduled)

Company Location	OT Hours This Week
The Aspenwood Company	135.7
	35.1
Employee 1	11.8
Employee 2	11.5
Employee 3	10.1
Employee 4	1.7
	96.4
Employee 1	42.6
Employee 2	15.3
Employee 3	14.9
Employee 4	13.6
Employee 5	8.9
Employee 6	1.1
	4.2
Employee 1	4.2
Grand Summary:	135.7

Team Member Creep Report | Yesterday

Company Community	Scheduled Start Time	Clock In Time	Scheduled End Time	Clock Out Time	Creep Hours
	04-01, 10:00:00 PM	04-01, 09:57:00 PM	04-02, 06:00:00 AM	04-02, 06:07:00 AM	3.34
	04-01, 04:00:00 PM	04-01, 03:49:00 PM	04-01, 07:00:00 PM	04-01, 06:54:00 PM	0.45
	04-01, 04:00:00 PM	04-01, 03:49:00 PM	04-01, 07:00:00 PM	04-01, 06:54:00 PM	0.45
	04-01, 10:00:00 PM	04-01, 09:57:00 PM	04-02, 06:00:00 AM	04-02, 06:07:00 AM	2.41
	04-01, 02:00:00 PM	04-01, 01:56:00 PM	04-01, 10:00:00 PM	04-01, 10:30:00 PM	0.57
	04-01, 06:00:00 AM	04-01, 06:00:00 AM	04-01, 02:00:00 PM	04-01, 02:31:00 PM	0.52
	04-01, 10:00:00 PM	04-01, 09:42:00 PM	04-02, 06:00:00 AM	04-02, 06:07:00 AM	0.42
	04-01, 02:00:00 PM	04-01, 01:55:00 PM	04-01, 10:00:00 PM	04-01, 10:04:00 PM	0.15

Meeting cadence example

Subject: Re: Aspenwood Heights Weekly Labor Management Review Importance ▾

 Aptos 8

Hello Heights team, below is a summary of our call today, let me know if you have any questions! You are all continuing to make great ground with your labor, I'm highlighting you as the top performer for the quarter in our quarterly review 😊 Keep up the great work.

Team Bridge Training: Justin praised ##### for the successful Team Bridge training, noting that almost everything is green and the healthcare schedule looks good.

Budget and Hours: Justin reviewed the hours from last week, noting that they were 100 hours under budget.

Hiring and Open Positions: Justin inquired about the open positions, and Monique mentioned the need for more hiring due to many new hires not working out and some employees moving from full-time to PRN. Kimberly suggested boosting ads on Indeed to attract more applicants. Kimberly and Monique discussed the need for more resident assistants, especially for the 2:00 PM to 10:00 PM shift. Kimberly suggested updating the job title to reflect the specific shift and boosting the ads on Indeed.

Call Offs and Open Shifts: Justin reviewed the call-offs for the week and noted that the culinary schedule is not up to date. Monique will work with Tanya to get that updated. I can also do another training with Tanya, just schedule that through the link I sent over.

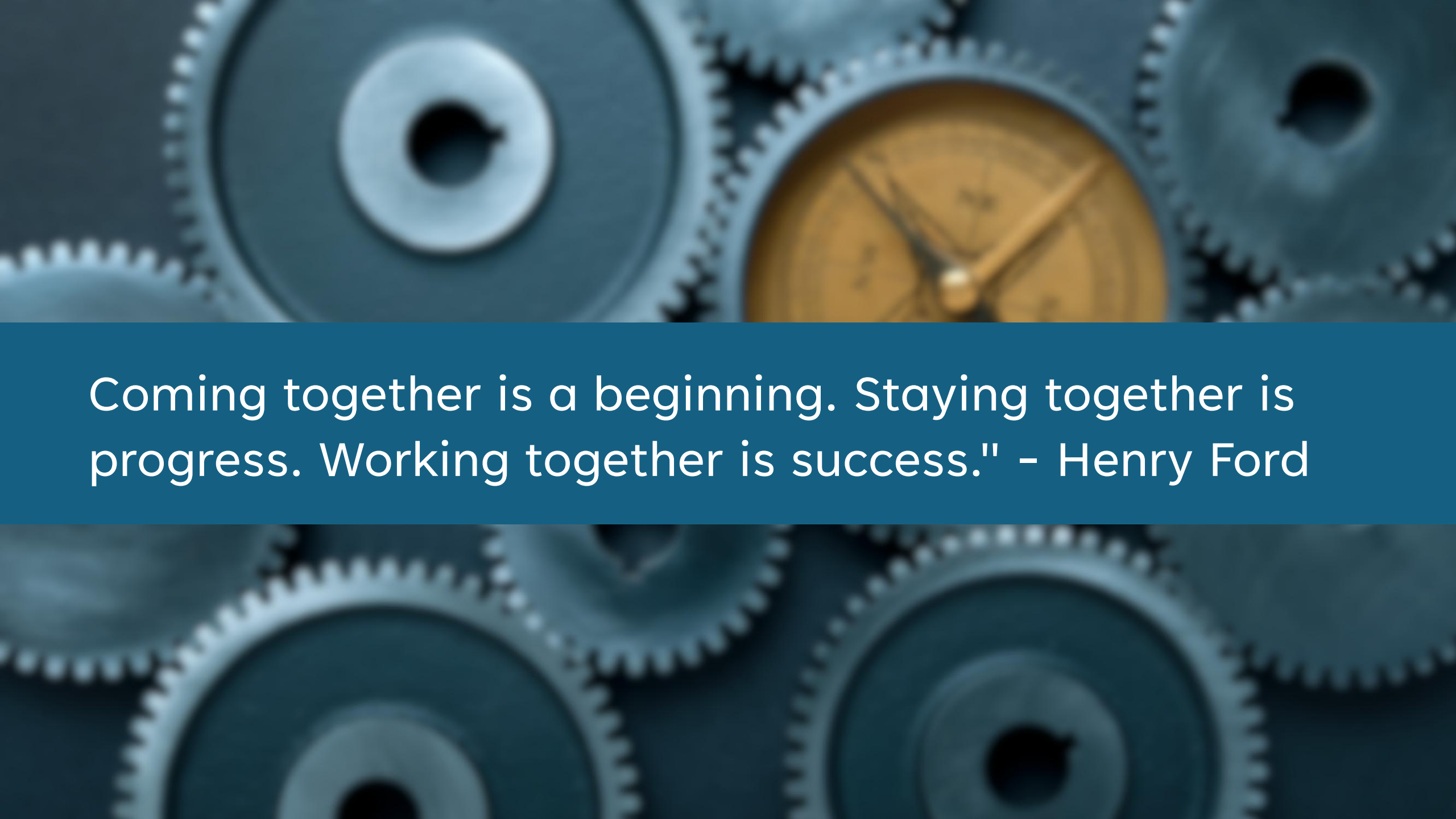
Clock In/Out Times: Justin reviewed the clock in/out times for several employees, noting instances of early or late clock-ins and clock-outs.

Request to Miss Break Form: Kimberly reminded the team about the "Request to Miss My Break or Meeting" form, which helps hold employees accountable for taking their breaks. Regina mentioned that she is trying to implement the form.

Life Enrichment Interviews: Kimberly and Monique discussed the interviews for the life enrichment position. Monique mentioned that she has set up interviews and will follow up with the candidates. Kimberly suggested getting the candidates in front of Amber sooner to keep the process moving.

Action Items:

- Review and correct the schedule for Rosie Fielder and Patricia Taylor to ensure their shifts are accurately reflected. (Regina)
- Monitor and manage overtime by trimming hours or swapping shifts for employees projected to exceed 40 hours. (Regina)



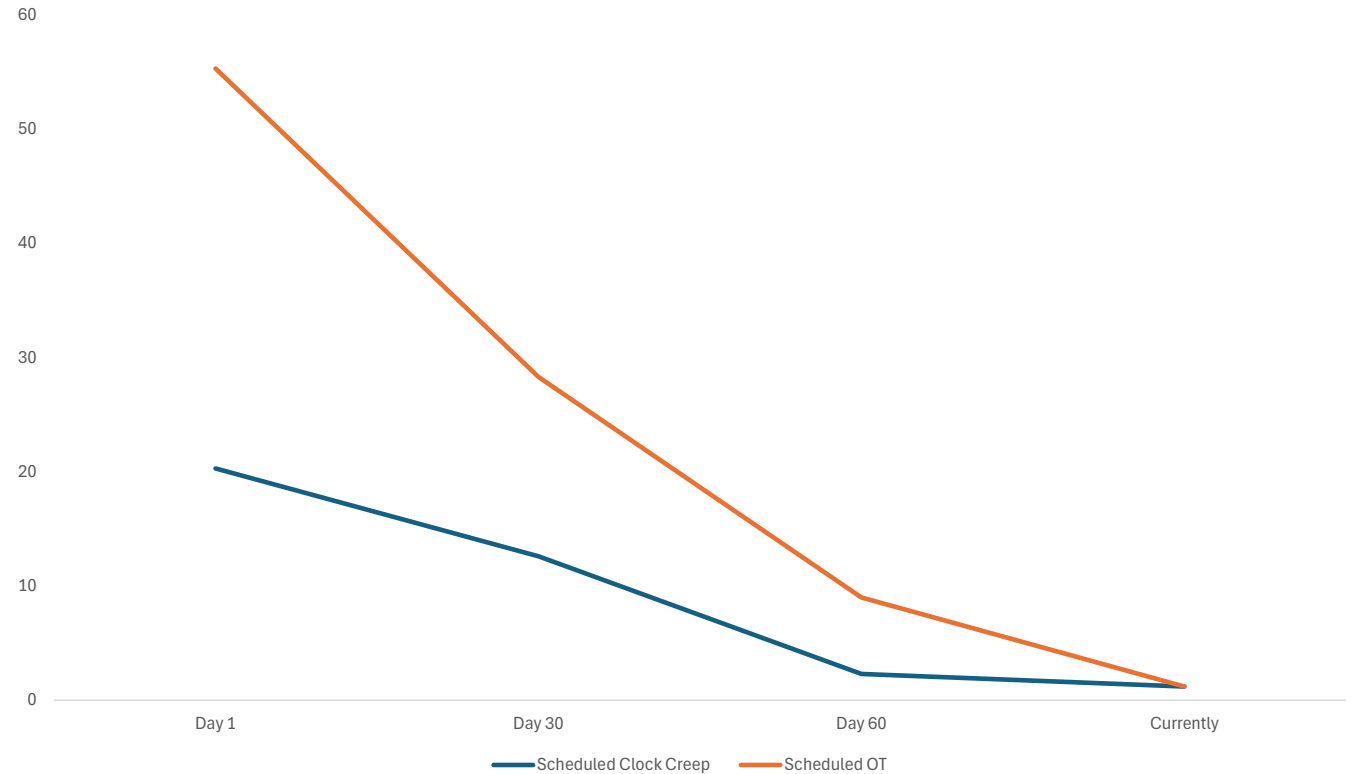
Coming together is a beginning. Staying together is progress. Working together is success." - Henry Ford

Focused Results

Community Outcomes Timeline

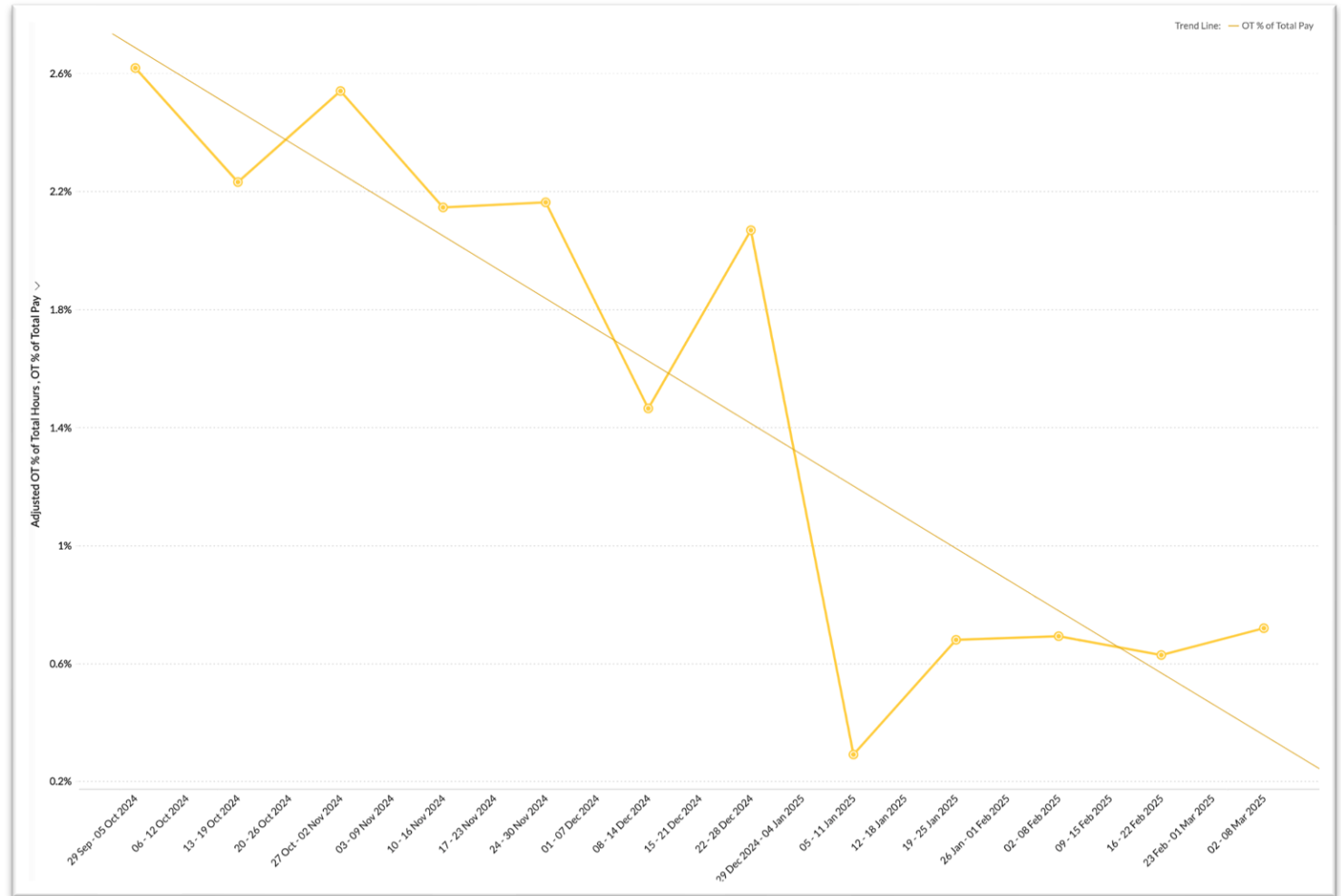
Timeline	Clock Creep in Schedule	OT in Schedule
Day 1	20.3 hours	35 hours
Day 30	12.6 hours	15.7 hours
Day 60	2.3 hours	6.7 hours
Current	1.2 hours	0 hours

Clock Creep & Scheduled Overtime



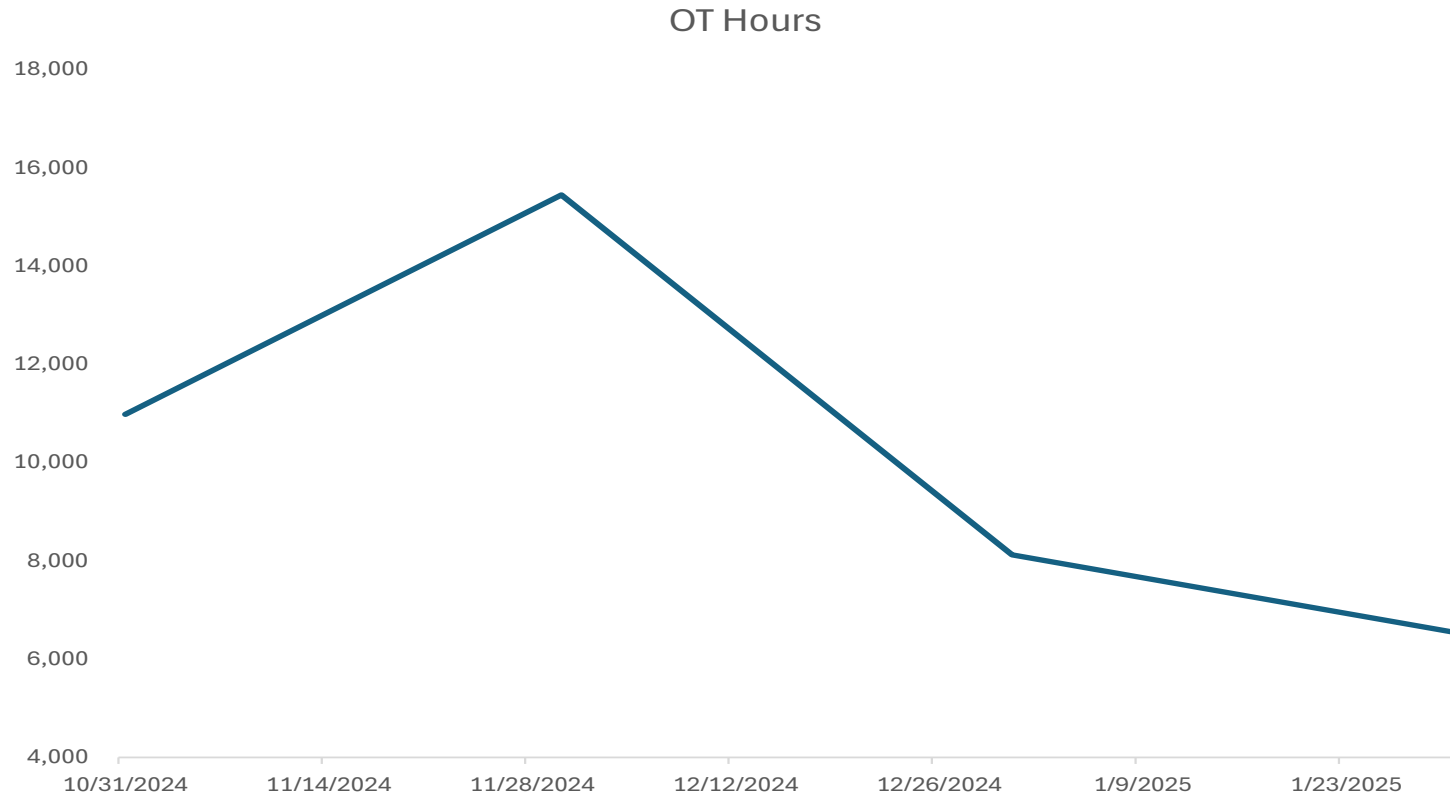
Overtime Reduction

Through proactive scheduling and strategically managing the schedule, red zone communities were able to decrease overtime percentages, while also decreasing overtime percent of spend.



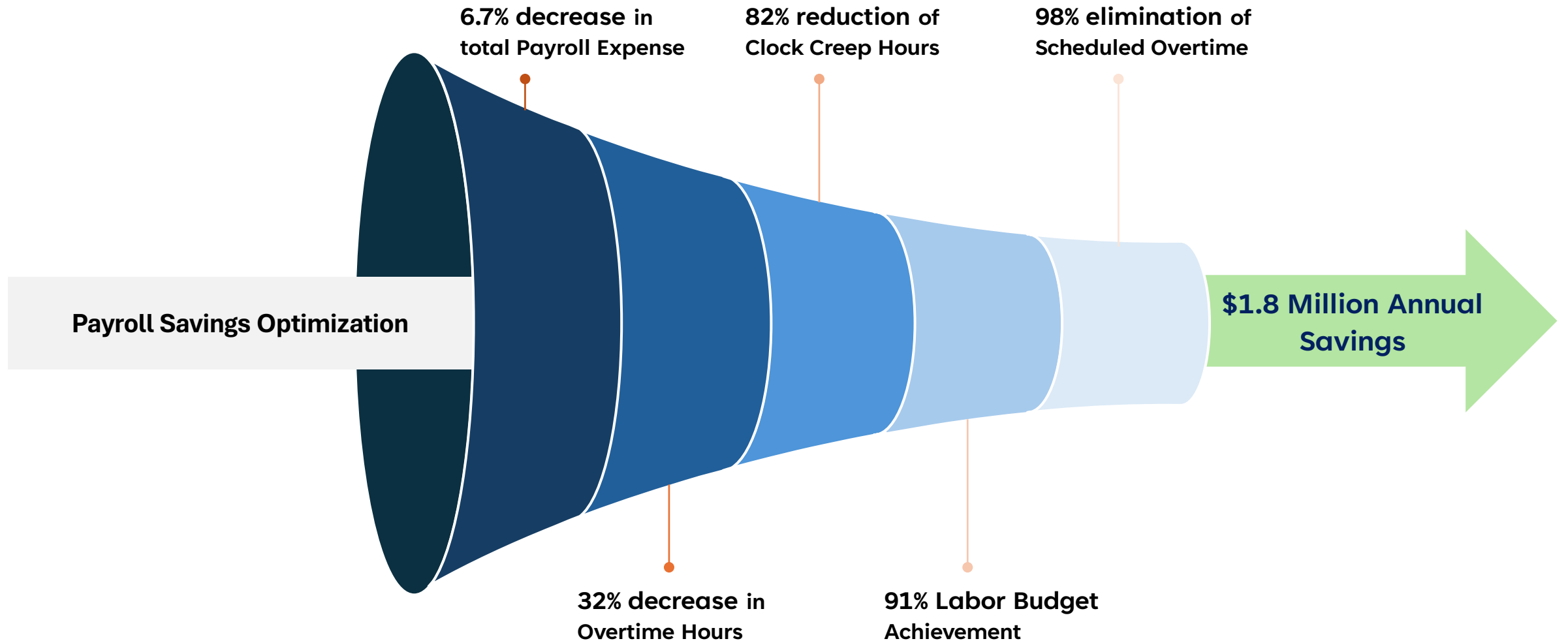
Labor Management Focus: Case Study Aspenwood

Overtime Case Study Oct 2024 – Jan 2025 Aspenwood



With a focus on overtime, Overtime hours reduced by 41% from October 2024 to January 2025.

Creating Real Savings





"The best way to predict the future is to create it."



Thank you!



Learn more about Procure



Learn more about The Aspenwood Company

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