Welcome to the first edition of Your Messenger, Heritage Senior Living’s company newsletter.

Inside you’ll find an array of Heritage news, from community highlights over the past several months (page 4) and notable employee anniversaries (page 3) to updates from the quality (page 5-6) and HR departments (page 7)!

This newsletter is for all our wonderful staff and partners who contribute to Heritage’s success day after day. Thank you for all you do!

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Heritage Senior Living Focuses on Technology

Heritage recently made a $500,000 investment in technology. This move is part of larger operational changes throughout the company that will position Heritage as a premier provider of senior living services.
MESSAGE FROM THE OWNER

Heritage Past and Present

Dear Heritage employees,

2018 marks 30 years since I founded MSP Real Estate, Heritage’s parent company. It also marks the 18th anniversary of Heritage itself. So it’s a great time to look back at the company’s start – and see how far we’ve come!

With a master’s degree in architecture, I spent my early career creating unique designs for residential properties. Wanting to strike out on my own, in 1988 I borrowed $12,000 from my dad to build an apartment building. That was the beginning of MSP Real Estate.

A few years later, I began to see the need for quality senior housing in the area, so I decided to branch out into this new sector in hopes of providing quality housing and care. Thus, Heritage was born.

Continued Growth
Now, MSP develops and builds all the Heritage properties, meaning we control the quality of our communities from the moment a shovel hits the ground to the daily management and care of our residents. And we’re continuing to build and grow – with two new communities opening in 2017 and one already set for completion this year!

Premier Provider in Wisconsin
Our increasing number of communities and high level of care have already made Heritage one of the premier senior living providers in Wisconsin. But we’re not going to stop there! Through continued improvements – and continued growth – we aim to be the senior living provider of choice for seniors, a goal that, with your help, I know we can achieve.

Giving Back
Because of my success – and the company’s success – I’m proud to be able to start giving back through a program called the Heritage Family Fund.

I’ve recently put $100,000 into the fund to help families who are running out of money, allowing them to live with us longer. This is part of our larger vision of transforming the industry for the better.

A Thank-You to Staff
I have also put $100,000 into an employee scholarship fund, whereby caregivers can become LPNs. Heritage wouldn’t be where it is today without our dedicated staff, so this is my way to say thank you, while also reinforcing our goal of professionalizing the industry.

Individuals are also welcome to contribute to both of these funds. If you are interested in donating, please contact Tess Burnham at 952-351-4541 or tburnham@msphousing.com.

Thank you again to all of our wonderful employees and partners for a great 30 years!

Milo Pinkerton
President and Founder of Heritage Senior Living

Heritage Senior Living By the Numbers
650+ Employees • 1,036 Beds • 2,000+ Residents • 15+ Communities
Welcome to the first ever edition of the Heritage Messenger. This newsletter is for all of our great employees, to help you feel connected, informed and like you’re part of something bigger. Our employees are the reason we are here today, and our growth and success is all due to you.

2017 was a great year here. We grew in numerous ways, welcoming two new communities, expanding our corporate team and hiring great employees at each site. And 2018 is already set to be even better!

**Technology to Help Staff**
Heritage recently made a $500,000 investment in technology. This, paired with the addition of a corporate IT team, will ensure our employees have access – state-of-the-art platforms and software, both to make their jobs easier and to improve resident care.

**Quality Initiatives**
We also have a renewed focus on quality, a push which began with the hiring of new clinical and quality staff. Plus, all of our policies and procedures are currently undergoing a review – and reworking – in accordance with WALA’s Diamond Accreditation program.

**Employee Education and Heritage University**
Our HR department is also proud to be rolling out Heritage University, with new education and trainings, as well as designated career paths that allow our employees to advance within the organization. Plus, our mentorship program will help new staff acclimate to their communities.

**Employee Uniforms**
Over the next few months, we will be transitioning to new professional uniforms. The nurses will be sporting white lab coats and the housekeeping staff and caregivers will be wearing separate distinct colors. These top-of-the-line uniforms will make it easy for residents to find the right employee when they need assistance, while also adding a little brightness to your day!

**New Vision Statement**
These great changes are all part of our new Heritage vision, which is to be the Midwest’s premier provider of senior living services, transforming the industry through innovation in care, employee development and resident lifestyle enhancement. To achieve our vision we:

- Strive to deliver the highest quality of care within every Heritage community
- Provide comprehensive and individualized care to each and every resident
- Meet and exceed both the cognitive and physical needs of our residents
- Create a comfortable lifestyle for seniors based on free choice, dignity and respect
- Promote innovation and centers of clinical excellence

Thank you for all you have done in support of this vision. I’m excited to see what we can accomplish together in the years to come.

**Employee Anniversaries**
Our employees are our best assets! That’s why we’re proud to celebrate those who have been with the team for 5, 10 and 15 years. Congratulations on this milestone. We hope to have you with us for many years to come.

**5 years**
Michelle Whitefeather
Tonisha Williams
Darice Fowler
Ryan N. Logan

Amanda Holden
Jericka Nelson
Lindsay Hansen
Laura Brown
Gene Kotlarek

Jill Thornton
David Sprewer
Raheal Tonge
Lucky Goode
Cheyenne Waggoner

Nicole Schoenherr
Phillip R. Falcon

**15 years**
Shaya T. Gills
COMMUNITY HIGHLIGHTS

Lake Country and Aspire Join the Heritage Family

With its grand opening in March of last year, Heritage Lake Country became the 14th Heritage community. Aspire Senior Living joined the ranks soon after, with a grand opening in July.

Both communities offer a full continuum of care, with independent, assisted living, enhanced assisted living and memory care. They also offer state-of-the-art features - like a pool, movie theater and therapy gym - offering residents a luxurious lifestyle for their retirement years.

Heritage Monona Pilots Unique Reminiscence Room

Last year, Heritage Monona revamped a private dining room into a 1950s-inspired reminiscence room, complete with a classic red, white and black color scheme, rock ‘n roll decor and a juke box. This therapeutic environment is designed to help dementia residents tap into positive memories from the past, which, in turn, can calm residents, increase mood and help them communicate.

Reminiscence rooms like this will eventually be a part of each Heritage memory care community.

Heritage Staff Members Attend Best Friends Training

As part of the ongoing staff training at Heritage, Jan Zimmerman (right), our corporate dementia specialist, and Pat Durham (left), our Heritage Deer Creek life enrichment director, received their Best Friends master trainer certification in 2017 in New Orleans.

The Best Friends approach to Dementia Care, developed by David Troxel (center), is a person/relationship-centered philosophy that helps our memory care residents feel safe, secure, connected and valued.
In the past year, Heritage has renewed its focus on clinical and quality matters. With a new clinical/quality staff, we are beginning a thorough policy review, as well company-wide audits. The goal is to deliver the highest quality of care within every Heritage community.

New Clinical/Quality Team
In the past year, we’ve welcomed Jaime Schwingel as vice president of quality and clinical operations, Gail Brown as our director of compliance, Amanda Runnoe as our director of quality and Danielle James as our quality specialist.

“I’m certain these additions, paired with our increased focus on quality, will help cement Heritage’s place as a leader in care and clinical practices,” states Pierre Verger.

New Partnerships
As part of Heritage’s clinical/quality growth, we’re also focused on creating partnerships and relationships with other industry leaders, like hospitals and nursing schools.

Technology and Training
Developing and adopting new technologies and softwares, like PointClickCare (see page 6), will also be of increasing importance when it comes to keeping Heritage ahead of the curve, as well properly training employees on these new platforms through flash trainings.

Policy and Procedures
On a community level, staff will be seeing changes to our existing policies and procedures as our new team completes audits and a thorough policy and procedure review. Once finalized, we’ll have company-wide trainings on our new set of 219 policies and procedures to ensure that staff understand and properly implement them at each site.

“These improvements will allow us to provide comprehensive care to each and every resident, meeting and exceeding their cognitive and physical needs,” says Verger.
Heritage Goes International with Dynseo Competition

From January 29-February 9, Heritage residents from all of our communities competed against other senior living communities worldwide in a brain training battle using ehealth software from Dynseo. Our residents were up against teams from France, Belgium and beyond in the 12-day competition. Each day, there were 32 questions - 16 easy and 16 difficult - on general culture topics, which they answered together as a team.

Each community was also encouraged to submit photos of their residents playing - and our communities got truly creative, with team T-shirts, USA flags, Olympic torches and event a cat mascot!

Congratulations to the staff and residents of Heritage Monona, who came in first among all U.S. teams!

What is Dynseo?

Dynseo, a partner of Heritage Senior Living, provides ehealth apps geared toward seniors, which help them improve memory, focus and concentration, maintain their reflexes, socialize with others and have fun in the process.

Their games range from geography and mathematics to reflex-based and general knowledge. Their technology is especially useful for seniors with neurodegenerative diseases, like Alzheimer’s, Parkinson’s or dementia, since it can track cognitive performance, identify any weaknesses, and then use this information to help slow down cognitive decline.

PCC has already been implemented at all communities, and staff will receive ongoing training to ensure proper utilization throughout the company.

“Having the ability to complete real-time charting provides accurate information,” Karen Redlin says of the software. “It’s also easier for myself and my team to communicate through it.”

Heritage Switches to PointClickCare Software

As part of Heritage’s renewed focus on quality, we’ve recently invested a significant amount in technology and staff training, beginning with the move to a new electronic health record software system, called PointClickCare (PCC).

PCC, the leading e-health record software in North America, will ensure better clinical oversight and monitoring of our residents. With PCC, nurses and RAs will always have residents’ important clinical info at their fingertips, allowing for more effective and efficient care.

Karen Redlin, Aspire Wellness Director
Hiring and Training Great Employees

The HR department’s focus is to hire, train and retain the best employees, creating a positive environment where both our employees and residents can thrive.

Career Discovery
We are always recruiting for key roles to help us in this mission, including CNAs/caregivers, LPNs/RNs, executive chefs and sous chefs, culinary aides, guest relations staff and housekeepers. If you know any interested individuals, direct them to apply on Indeed, to visit our website or to join us at a career discovery fair.

Employee Education
We are also developing two new programs to better educate employees. Our mentorship program will help improve our new caregivers’ knowledge and quality of service, while HSL University, an internal training center, will provide onboarding and other staff trainings. HSL University will also offer CNA certification and, eventually, LPN licensing, which, paired with Milo’s fund, will allow select caregivers to become CNAs and CNAs to become LPNs as part of our designated career path. We’re excited for these changes, which will allow our employees the chance to succeed in their roles and grow with the organization.

Employee Testimonials

A Chance to Make a Difference
“The most rewarding part of the job is that it allows me to directly impact the lives of our residents, families and staff. Whether it’s ensuring the cleanliness of the building, meeting with families or just saying ‘hi’ to residents in the morning, I know I am actively contributing to their quality of life. And I treasure the interactions. Some days, I think they make more of a difference in my life than I do in theirs!” - Michelle Carter, Monona AD

Great Investment in Tech
“The tablets we have around the community are very convenient! Not only do we like having them on med carts and walls – since they free up a lot of space – but we also get to use them for Dynseo in Memory Care. The residents really enjoy the different games they can play.” - Laurie R., Aspire LPN Supervisor

Become a mentor
Are you a leader who wants to make a difference at Heritage? Become a mentor! Heritage mentors will:

- Mentor up to 5 staff members at a time
- Receive a certification and pin after successful training completion
- Receive a monetary bonus for each trainee who continues their employment at Heritage

To be eligible to become a mentor, you must:

- Be employed at Heritage for 6 months or longer
- Possess a pleasant, personal demeanor
- Have no disciplinary actions within the preceding 12 months
- Show strong clinical and policy knowledge with a thorough understanding of Heritage

Apply today!
See your executive director for an application.