

2025 Annual Report

ripples of IMPACT

 **LeadingAge**[®]
Washington

LETTER FROM THE PRESIDENT & CEO



Dear LeadingAge Washington Members:

I assumed the CEO role in June 2024, and the past year has been an exhilarating rollercoaster ride! Here are a few reflections on our four areas of focus:

Advocacy: In one of the most challenging legislative sessions in recent memory, we fought hard to preserve funding and prevent misguided regulation. The partnership between our VP of Public Policy, Alyssa Odegaard, and our new contract lobbyist, Katherine Mahoney, is achieving great results!

Education: Sarah Whitmarsh took on the new role of VP of Member Engagement last August, and she immediately took our educational offerings to the next level! We had a great fall conference, record enrollment for our Leadership Institute, and a successful revamp of our AL management training.

Engagement: We are working hard to create opportunities for our staff to engage with members, and for our members to engage with each other. Staff have made dozens of site visits to members across the state, and we've revitalized our professional networks to encourage supportive peer groups.

Inspiration: Our members are amazing, and the work they do is truly inspirational. We look forward to recognizing some of their extraordinary accomplishments with this year's Awards of Excellence!

What stands out to me is the degree to which we are interconnected. We are better together, and we have more fun together! I'm proud to be part of this LeadingAge family.

A handwritten signature in black ink that reads "Glen Melin".

Glen Melin

President & CEO

LeadingAge Washington Staff

Alyssa Odegaard, Vice President of Public Policy

Alyssa provides policy leadership, working with federal and state decision-makers. She helps members identify and assess their legislative and regulatory needs, analyzes legislative and regulatory initiatives, and equips members to engage in advocacy.

Laura Hofmann, Vice President of Clinical & Regulatory Services

Laura uses her extensive experience as an RN leader to support skilled nursing and assisted living members. She monitors and reports on survey trends for members and acts as an intermediary between members and quality oversight agencies.

Sarah Whitmarsh, Vice President of Member Engagement

Sarah's areas of focus include member relations and communications, education and professional development, and workforce development. Sarah's primary responsibilities are to align our efforts with the wants and needs of our members.

Cassi Meritt, Director of Member Data & Business Services

Cassi staffs our Tacoma office and manages our membership database. She oversees our accounts receivable and is a great resource for members with financial questions related to membership. Cassi is also a key connector for our business partners.

MESSAGE FROM THE BOARD CHAIR



Dear Members,

As my time as board chair winds down, I am struck with an overwhelming sense of gratitude for this community of dedicated and passionate peers. Thanks to you, our organization faced significant change this year and thrived!

For the first time in over two decades we welcomed a new CEO to the organization. For the first time in over ten years we welcomed a new lobbyist to advocate on our behalf. For the first time since 2016 our organization conducted a full audit. We added a Vice President of Member Engagement and have seen our programs flourish. Our future looks bright!

None of this would have been possible without the engagement and commitment of our members – from the Finance and Audit Committee, to our Board and CEO Search Committee, to our Leadership Institute “faculty,” and beyond. Being there for each other has supported the organization, and in turn the organization has supported all of us.

Thank you for the opportunity to have served with and for all of you. Because of you, this year was just a preview of the good to come.

With full appreciation,

Grant Linacre

Board Chair, 2023–2025

LeadingAge Washington 2024–2025 Board of Directors

Officers

Grant Linacre, Board Chair (Emerald Heights)

Jim Maxwell, Chair-Elect (Rockwood Retirement Communities)

Lynette Ladenburg, Immediate Past Chair (Martha and Mary)

Charles “Bill” Strader, Secretary (Panorama)

Judy Dunn, Treasurer (Franke Tobey Jones)

Directors

Jen Drake V2 (Cascade Senior Living Services)

Jonathan Boyar (Judson Park)

Ashley Healey (Cheney Care Center)

Heather Lewis (Christian Health Care Center)

Heather Turner (Timber Ridge at Talus)

Ketty Hsieh (Kin On Health Care Center)

Matthew Powondra (Mary Schwartz Summit)

Kevin McNamara (Wesley)

Gary Dewhirst (Warm Beach Senior Community)

Matt Fleming (Sunshine Health & Rehab)

Dianna Reely (Providence Health & Services)

Shannon Finegood (Comagine Health)

Donald Smith (Workforce Training & Education Coord. Board)

MESSAGE FROM THE TREASURER



Dear Members,

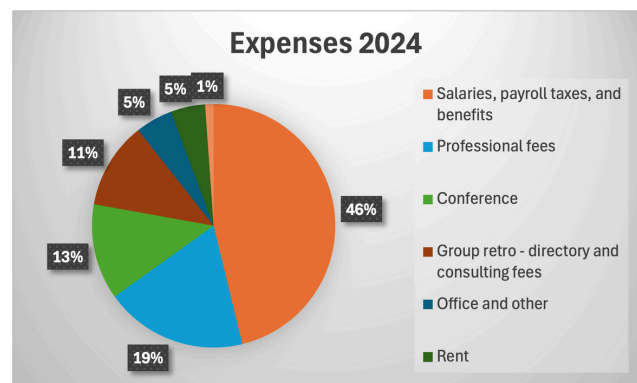
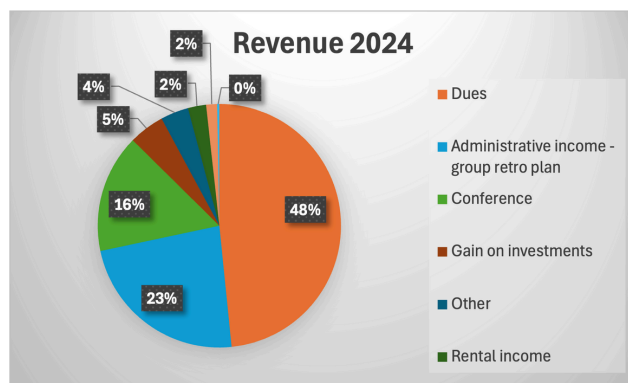
I am pleased to present the Independent Accountant's Audit Report for 2024, conducted by the CPA firm Brantley Janson, which resulted in a clean report with no material modifications to the consolidated financial statements, which are presented in accordance with generally accepted accounting principles.

I would like to express my appreciation to the Finance and Audit Committee for their ongoing support and dedication to serving LeadingAge Washington. I would also like to thank Glen Melin for his leadership and the association's staff for their efforts in managing operations and maintaining a solid financial position.

For 2024, revenue increased by \$133,049 compared to 2023, due to increases in membership and group retro dues and rental income. Expenses in 2024 were lower than the previous year by \$117,658, due to several factors: staffing changes resulted in lower salaries and benefits and a decrease in conference related expenses. These differences resulted in a positive change in net assets of \$376,900. Cash and cash equivalents increased by approx. \$262,000 for 2024.

Thank you for your support and the opportunity to serve as your Treasurer.

Judy Dunn
Treasurer



Statement of FINANCIAL POSITION

| | <u>2024</u> | <u>2023</u> |
|---|------------------|------------------|
| <u>ASSETS</u> | | |
| CURRENT ASSETS | | |
| Cash and cash equivalents | 700,514 | 438,404 |
| Investments | 1,232,076 | 1,101,859 |
| Accounts receivable | 35,337 | 31,832 |
| Prepaid expenses | 38,377 | 41,524 |
| Investments - restricted for group retro plan | 3,661,813 | 4,269,056 |
| Total current assets | <u>5,668,117</u> | <u>5,882,675</u> |
| | | |
| FURNITURE AND EQUIPMENT, net | 50,036 | 71,317 |
| | | |
| OTHER ASSETS | | |
| Operating right-of-use assets, net | 198,883 | 277,576 |
| Deferred compensation | - | 232,279 |
| Deposit | 8,194 | 8,194 |
| | <u>207,077</u> | <u>518,049</u> |
| | | |
| TOTAL ASSETS | <u>5,925,230</u> | <u>6,472,041</u> |
| | | |
| <u>LIABILITIES AND NET ASSETS</u> | | |
| CURRENT LIABILITIES | | |
| Accounts payable | 45,194 | 45,340 |
| Deferred compensation | - | 232,279 |
| Accrued benefits and expenses | 48,229 | 63,621 |
| Deferred revenues | 185,407 | 157,052 |
| Current portion of operating lease liabilities | 104,324 | 100,416 |
| Due to members - group retro plan | 3,664,476 | 4,268,309 |
| Total current liabilities | <u>4,047,630</u> | <u>4,867,017</u> |
| | | |
| NONCURRENT LIABILITIES | | |
| Operating lease liabilities, net of current portion | <u>156,364</u> | <u>260,688</u> |
| | | |
| TOTAL LIABILITIES | 4,203,994 | 5,127,705 |
| | | |
| NET ASSETS, without donor restrictions | <u>1,721,236</u> | <u>1,344,336</u> |
| | | |
| TOTAL LIABILITIES AND NET ASSETS | <u>5,925,230</u> | <u>6,472,041</u> |

Statement of **ACTIVITIES**

| | <u>2024</u> | <u>2023</u> |
|---|-------------------------|-------------------------|
| REVENUES | | |
| Dues | 1,096,589 | 1,029,309 |
| Administrative income - group retro plan | 527,484 | 483,044 |
| Conference | 356,349 | 361,203 |
| Gain on investments | 107,197 | 124,185 |
| Other | 84,253 | 57,973 |
| Rental income | 54,663 | 34,876 |
| Interest and dividend income | 33,137 | 29,089 |
| Grants | 6,539 | 13,483 |
| | <u>2,266,211</u> | <u>2,133,162</u> |
| EXPENSES | | |
| Salaries, payroll taxes, and benefits | 872,841 | 986,214 |
| Professional fees | 357,208 | 303,039 |
| Conference | 240,430 | 290,139 |
| Group retro - directory and consulting fees | 217,852 | 213,000 |
| Office and other | 93,163 | 106,075 |
| Rent | 86,536 | 79,549 |
| Depreciation | 21,281 | 28,953 |
| | <u>1,889,311</u> | <u>2,006,969</u> |
| CHANGE IN NET ASSETS | 376,900 | 126,193 |
| NET ASSETS, beginning of year | <u>1,344,336</u> | <u>1,218,143</u> |
| NET ASSETS, end of year | <u><u>1,721,236</u></u> | <u><u>1,344,336</u></u> |

2024–2025 Policy Highlights

LeadingAge Washington Advocacy in Action

The 2025 legislative session was one of the most difficult in recent years for long-term care. Faced with proposals to freeze rates, increase taxes, and introduce many new regulations, LeadingAge Washington led advocacy efforts to protect and support our members across the care continuum. While the final budget didn't go as far as we requested, our collective voice made a difference, preserving critical funding and shaping key legislation that impacts your communities.

Budget Advocacy Wins

We pushed hard against devastating funding cuts and advocated for investments that reflect the true cost of care:

Nursing Homes

- Secured funding for a facility-specific add-on to help offset expiration of rate increases from the previous biennium.
- Maintained scheduled rebase funding for July 2026, critical to align rates with actual cost.
- Fought for license fee relief, securing a Medicaid add-on to offset a substantial increase from \$359 to over \$800.

Assisted Living

- Extended the high Medicaid add-on of \$20.99 for communities with at least 75% Medicaid occupancy.
- Preserved the July 2026 rebase, ensuring future rate updates: Average AL rate increases from \$134 to \$149; Specialized Dementia Care rate increases from \$216 to \$236
- Secured offsetting Medicaid funds to cover the increase in license fees from \$116 to \$383

Adult Day

We advocated for a rate increase for adult day health and adult day care, but no funding was included in the final budget. We will continue to prioritize this next session.

Policy Advocacy -- In addition to budget work, we helped shape the following bills:

- SB 5672 – Delayed Home Care Aide Certification: Extended certification deadlines to address the workforce crisis.
- SB 5337 – Memory Care Certification: Helped shape a new DSHS certification for memory care units and facilities. We will be fully engaged in the rulemaking process to ensure it is practical and provider-informed.
- SB 5691 – CCRC Oversight: After years of work, a bill was introduced to enhance oversight and transparency in CCRCs. We worked to ensure the final legislation was practical for providers. The final bill amends the Attorney General's authority under the Consumer Protection Act and requires CCRCs to disclose whether entrance fees cover future care. We will continue this work in the interim.

Ongoing Regulatory Work: We continue to work with state agencies on discharge and transfer policies, particularly around nonpayment and Medicaid resident participation. We're advocating for the preservation of project-based vouchers in AL to maintain housing stability for low-income seniors. We're partnering with the Workforce Training & Education Board to identify long-term solutions to the workforce crisis. As an active member of the Dementia Action Collaborative, we help shape policies and resources to support individuals living with dementia. Additionally, we are engaged in the transition to the Patient-Driven Payment Model (PDPM) for skilled nursing providers.

Report from Sarah Whitmarsh

VP of Member Engagement

2024 marked a year of strategic transformation for LeadingAge Washington, setting the stage for significant growth. A new Vice President of Member Engagement position was created to strengthen provider relationships and expand workforce development initiatives.

The first strategic priority was to enhance engagement within workforce development initiatives. Two cornerstone programs – ELEVATE and the Leadership Institute – were revitalized with new logos and targeted marketing efforts, bringing a noticeable uptick in both enrollment numbers and program visibility. This refresh not only breathed new life into these tried-and-true programs but also positioned them to better serve the evolving needs of Washington's aging services sector. A secondary priority was to expand conference marketing and strengthen annual conference sessions through increased involvement from academic and industry leaders. Looking ahead, the LeadingAge Washington team has a renewed commitment to nurturing the next generation of aging services leaders through expanded professional network groups, increased member site visits, and the creation of new training programs.

The seeds planted in 2024 position LeadingAge Washington for future success. This progress is rooted in the invaluable support of provider members, whose dedication drives the shared mission of enhancing older adults' lives across the state.

Report from Laura Hofmann

VP of Clinical & Regulatory Services

We have enjoyed many opportunities to connect with our skilled nursing and assisted living member communities this last year. Laura Hofmann was able to meet 1:1 with all our nursing homes to do in-depth training on the new Guidance to Surveyors, which was released in November 2024. These significant changes will have an impact on how surveyors interpret the guidance, and they have the potential to increase citations. We are confident our members will benefit from this training opportunity to improve their processes and help decrease potential citations.

Our Skilled Nursing Friday Update calls, launched in 2020, continue to be a valued resource. Celebrating their five-year anniversary, these well-attended calls provide real-time updates from CMS, RCS, DOH, and other regulatory agencies.

We also reinstated our monthly Assisted Living Provider Update calls, focusing on trending citations and preparing members for the upcoming Memory Care Certification requirements.

Through targeted training, on-site visits, and regular communication, we remain committed to keeping our members informed and prepared for regulatory and operational challenges. These connections strengthen our collective ability to navigate a complex and evolving care environment.

COMMUNITY MEMBERS

6th Avenue Senior Living, **Tacoma**
Adult Day Services of the Tri-Cities, **Kennewick**
Arlington Health and Rehabilitation, **Everett**
Arrowhead Gardens, **Seattle**
Ashwood Court Apartments, **Bellevue**
Bailey ~~Roush~~ House, **Seattle**
Bayview, **Seattle**
Bethany at Pacific, **Everett**
Bethany at Silver Crest, **Everett**
Bethany at Silver Lake, **Seattle**
Bothell Health Care, **Bothell**
Boulevard Place, **Bothell**
Campus Towers, **Longview**
Cannon House, **Seattle**
Canterbury Manor, **Bremerton**
Cascade Park Active Day, **Tacoma**
Cascade Park Apartments, **North Bend**
Cascade Park Gardens, **Tacoma**
Cascade Park Vista, **Tacoma**
CDM Caregiving Services, **Vancouver**
Cedar River Court, **Renton**
Celebration Senior Living, **Federal Way**
Cheney Care Center, **Cheney**
Christian Health Care Center, **Lynden**
Colonial Residence, **Centralia**
Columbia Lutheran Home, **Seattle**
Conservatory Place, **Tacoma**
Council House, **Seattle**
(The) Courtyard at Cristwood, **Shoreline**
Covenant Living at the Shores, **Mercer Island**
CRISTA Shores, **Silverdale**
Cristwood Garden, **Shoreline**
Cristwood Park, **Shoreline**
Crossroads Senior Living, **Bellevue**
~~Eliso~~, **Tacoma**
Emerald Heights, **Redmond**
Esperanza Apartments, **Seattle**
Ethiopian Village, **Seattle**
Everett Transitional Care Services, **Everett**
Evergreen Court, **Seattle**
Ferry County Health, **Republic**
Filipino Community Village, **Seattle**
Fircrest RHC, **Shoreline**
Franke Tobey Jones, **Tacoma**
Fred Lind Manor, **Seattle**
Full Life Care, **Seattle**
Garden Terrace, **Wenatchee**
GenCare Lifestyle at Point Ruston, **Tacoma**
GenCare Lifestyle Ballard Landmark, **Seattle**
GenCare Lifestyle Federal Way, **Federal Way**
GenCare Lifestyle Scriber Gardens, **Lynnwood**
GenCare Lifestyle Lodge at Eagle Ridge, **Renton**
GenCare Lifestyle Village at Granite Falls

Greenbrier Family Apartments, **Woodinville**
Greenbrier Senior Apartments, **Woodinville**
Harbor View Manor, **Tacoma**
(The) Hearthstone, **Seattle**
Heron Landing Apartments, **Kenmore**
Heron Run, **Kenmore**
Heron's Key at Gig Harbor, **Gig Harbor**
Hilltop House, **Seattle**
Holman Gardens, **Spokane Valley**
Horizon House, **Seattle**
Interurban Senior Living, **Seattle**
Josephine Caring Community, **Stanwood**
Judson Park, **Des Moines**
Kawabe Memorial House, **Seattle**
Keiro Northwest - Nikkei Manor, **Seattle**
(The) Kenney, **Seattle**
Kin On Assisted Living and Adult Family Home, **Sea**
Kin On Rehab and Care Center, **Seattle**
King County Housing Authority, **Tukwila**
Kings Manor Senior Living, **Tacoma**
Kinship PACE of the Tri-Cities, **Vancouver**
Kline Galland (Home Health/Home Care/Hospice), **Sea**
Kline Galland Home, **Seattle**
La Conner Retirement Inn, **La Conner**
Legacy House, **Seattle**
Lilac Plaza, **Spokane**
Logan Health Care Center, **Conrad, MT**
Maple Creek Senior Living, **Lakewood**
Martha & Mary, **Poulsbo**
Mary Schwartz Summit - Kline Galland, **Seattle**
Marymount Manor, **Tacoma**
McKay Healthcare & Rehab Center, **Soap Lake**
Mirabella Seattle, **Seattle**
Mountlake Senior Living, **Mountlake Terrace**
Mt. Baker Care Center, **Everett**
Mt. Si Senior Center, **North Bend**
Mustard Seed Village, **Lakebay**
New Haven, **Seattle**
Norse Home, **Seattle**
North Valley Hospital Extended Care, **Tonasket**
Northaven Assisted Living, **Seattle**
Northaven Senior Living, **Seattle**
Northaven West, **Seattle**
Northshore Adult Day Health, **Bothell**
Odessa Memorial Healthcare Center, **Odessa**
Pacific Regent Bellevue, **Bellevue**
Panorama, **Lacey**
Park Place Assisted Living, **Seattle**
Parkshore, **Seattle**
(The) Pearl on Oyster Bay, **Bremerton**
Peoples Senior Living, **Tacoma**
Pinewood Manor, **Bremerton**
PNW PACE, **Tacoma**

Providence
Emilie Court Assisted Living, **Spokane**
Marianwood, **Issaquah**
Mother Joseph Care Center, **Olympia**
Mount St. Vincent, **Seattle**
St. Joseph's Care Center, **Spokane**
Puyallup Nursing and Rehabilitation, **Puyallup**
Puyallup Tribe of Indians - Elder Service &
Wellness Center, **Tacoma**
Quail Park Memory Care Residences of West Seattle
Quail Park of Lynnwood, **Lynnwood**
Riverview Memory Care, **Spokane**
Riverview Retirement Communities, **Spokane**
~~Riverwest~~ Senior Living, **Wenatchee**
Rock Cove Assisted Living, **Stevenson**
Rockwood at Whitworth, **Spokane**
Rockwood South Hill, **Spokane**
Rose Villa Senior Living, **Portland, OR**
Salishan Gardens, **Tacoma**
Seattle's Union Gospel Mission, **Seattle**
Sequoia Senior Living, **The, Olympia**
Sharon Care Center, **Centralia**
Shepherd's Garden, **Lynnwood**
Skyline, **Seattle**
SNJM Washington Health & Well-Being, **Spokane**
Sno Ridge Apartments, **North Bend**
Spokane Veterans Home, **Spokane**
St. Andrew's Place, **Port Angeles**
Sun Tower, **Yakima**
Sunnyside Assisted Living, **Yakima**
Sunset Garden, **Puyallup**
Sunshine Health and Rehab, **Spokane Valley**
Tacoma Nursing and Rehabilitation, **Tacoma**
Terraces at Summitview, **Yakima**
Terwilliger Plaza, **Portland, OR**
Three Rivers Village, **Richland**
Timber Ridge at Talus, **Issaquah**
Titus Village, **Kent**
Tri Court, **Kent**
Tukwila Village Senior Living, **Tukwila**
Victoria Park, **Seattle**
Village Senior Living, **The, Tacoma**
View Ridge Care Center, **Everett**
Walla Walla Veterans Home, **Walla Walla**
Warm Beach Senior Community, **Stanwood**
Washington Odd Fellows Home, **Walla Walla**
Washington Soldiers Home, **Orting**
Washington Veterans Home, **Port Orchard**
Wesley at ~~Lehalsh~~, **Bonnie Lake**
Wesley Bradley Park, **Puyallup**
Wesley Des Moines, **Des Moines**
Wesley Lea Hill, **Auburn**
Willamette Court, **Federal Way**

BUSINESS SPONSORS

DIAMOND

Ballard Spahr Lane Powell
Consonus Healthcare Services
Washington State Housing Finance Commission
Ziegler

Ruby

McKesson Medical-Surgical

Sapphire

Blue Architecture, LLC
CCL Hospitality Group
Compliance Store, The
Forefront Healthcare
HRS Premier
HUB International Northwest
Mercury Pharmacy Services
Propel Insurance
USI Northwest

Emerald

Cain Brothers
Kate Baldwin Photography, Inc.
OPTUM, Complex Care Management
Polsinelli PC
Risk Finance

Pearl

Agile Consulting Group
GLY Construction
Graham Capital
Hanson Bridgett
KARE
Restaura
Senior Services of America
SenioROI
Technology Unlimited, Inc.
Walsh Construction Co.WA
Wind Northwest

OPAL BUSINESS MEMBERS

3rd3rd Marketing
A/R SNF Solutions
Accrete Construction
Aegis Therapies
Aidan Health Services
Ankrom Moisan Architects
Areté Architecture
AssuredPartners of Oregon
Badgley Homes/Windermere
Big Haul Junk Removal and
Property Services
CareLinx by Sharecare
Clark Nuber PS
CliftonLarsonAllen
Comagine Health
Consolidated Billing Services, Inc.
Cornerstone Clinical Consulting
Deacon Construction
Dietitian Consulting Services
DispatchHealth Imaging
Ecolab
Elder Dynamics
Elderwise, Inc.
Essity
Gabbert Architects Planners
Gentle Passage Doula Collective
Graham-Field
Hansen Hunter & Co.
Healthcare Services Group
Hillis Clark Martin & Peterson
Hoagland Pharmacy
HPSI Purchasing Services
Infinity Rehab
Interactive Medical Systems
Legacy Power Systems
LiveWell Home Lending
LRS Architects
Matrix Pharmacy
MediCleanse Linen Service, Service Linen Supply
Medline Industries
Moss Adams
Orrick, Herrington & Sutcliffe LLP
Perkins Eastman Architects
Rice Fergus Miller, Architects, Interiors, & Master
Planning
Schetky Bus and Van Sales
Sechrist Design Associates
Securus Systems
SisAdmin
Sodexo Seniors
Soundview Medical Supply
SYSCO Food Services of Seattle
Tacoma Rainiers Baseball Club
Team Red Real Estate Keller Williams
Time Equipment Company
TridentCare
TwinMed
Unitek Learning
Violett
Viventium
Wattenbarger Architects

LeadingAge Washington is grateful to all our sponsors and business members at every level. Our provider members depend on your services and expertise to carry out their missions. We couldn't do it without you!

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