



# A Strategic Alliance

*November 18, 2021*



## *Introductions*

### **Jerry Grant**

- *Chief Executive Officer*

### **Karen Christiansen**

- *President*

### **Jim Petty**

- *Senior VP, Strategy & Business Development*

# AGENDA

- The Acts Organization
- The Strategic Alliance
- Willow Valley Leadership Team
- Questions & Answers



# The Origin of Acts



- Founded in 1971
- Church of the Open Door
- Concern of Church Pastor
- Moved Beyond Original Church Sponsorship
- Non-denominational
- Christian Principles

*Acts and WVC had common founding members and structure.*



# ORGANIZATIONAL OVERVIEW

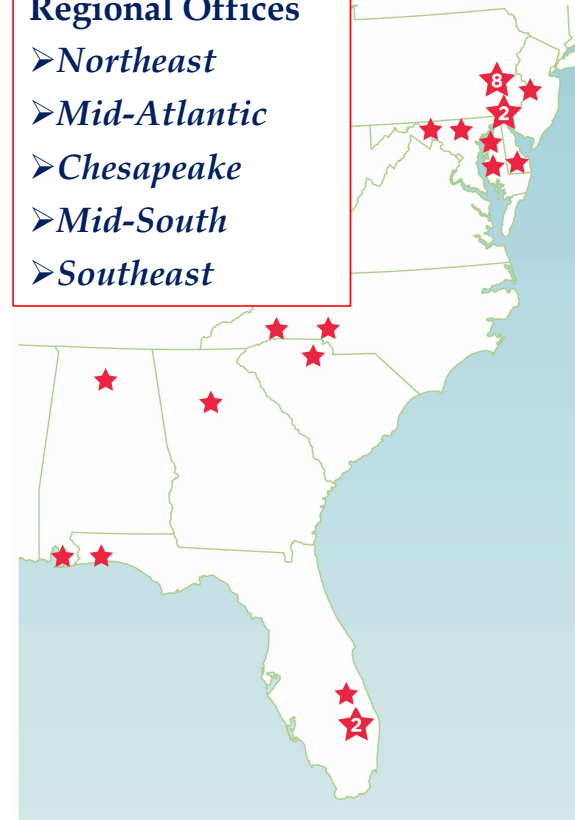
Acts is #3 on LZ200 of the nation's largest not-for-profit senior living organizations

# of Life Plan Communities	26
<i>Independent Living Units</i>	6,728
<i>Assisted Living Units</i>	1,187
<i>Skilled Nursing Beds</i>	1,762
# of Residents	10,282
# of Employees (ft & pt)	7,007

- Total Assets exceed \$2.0B
- Annual Operating Revenue approx. \$600M
- Fitch rating "A-"
- Regional management with corporate support services

## Regional Offices

- Northeast
- Mid-Atlantic
- Chesapeake
- Mid-South
- Southeast



# The Acts Communities

*Variety & Diversity: Locations*





Mountains of North Carolina (Tryon Estates)





Chester River Dock by Chesapeake Bay (Heron Point of Chestertown)







Lake Lanier and Georgia Mountains - (Lanier Village Estates)



WILLOW  
VALLEY  
COMMUNITIES



Where Loving Kindness Lives



Highrise Community in Hockessin, Delaware (Cokesbury Village)





Boca Raton, Florida (Saint Andrews Estates)



# The Acts Communities

*Variety & Diversity: Residences*













# The Acts Communities

*Variety & Diversity: Amenities*





Mini-golf course during "OlympiActs"



WILLOW  
VALLEY  
COMMUNITIES



Where Loving-Kindness Lives



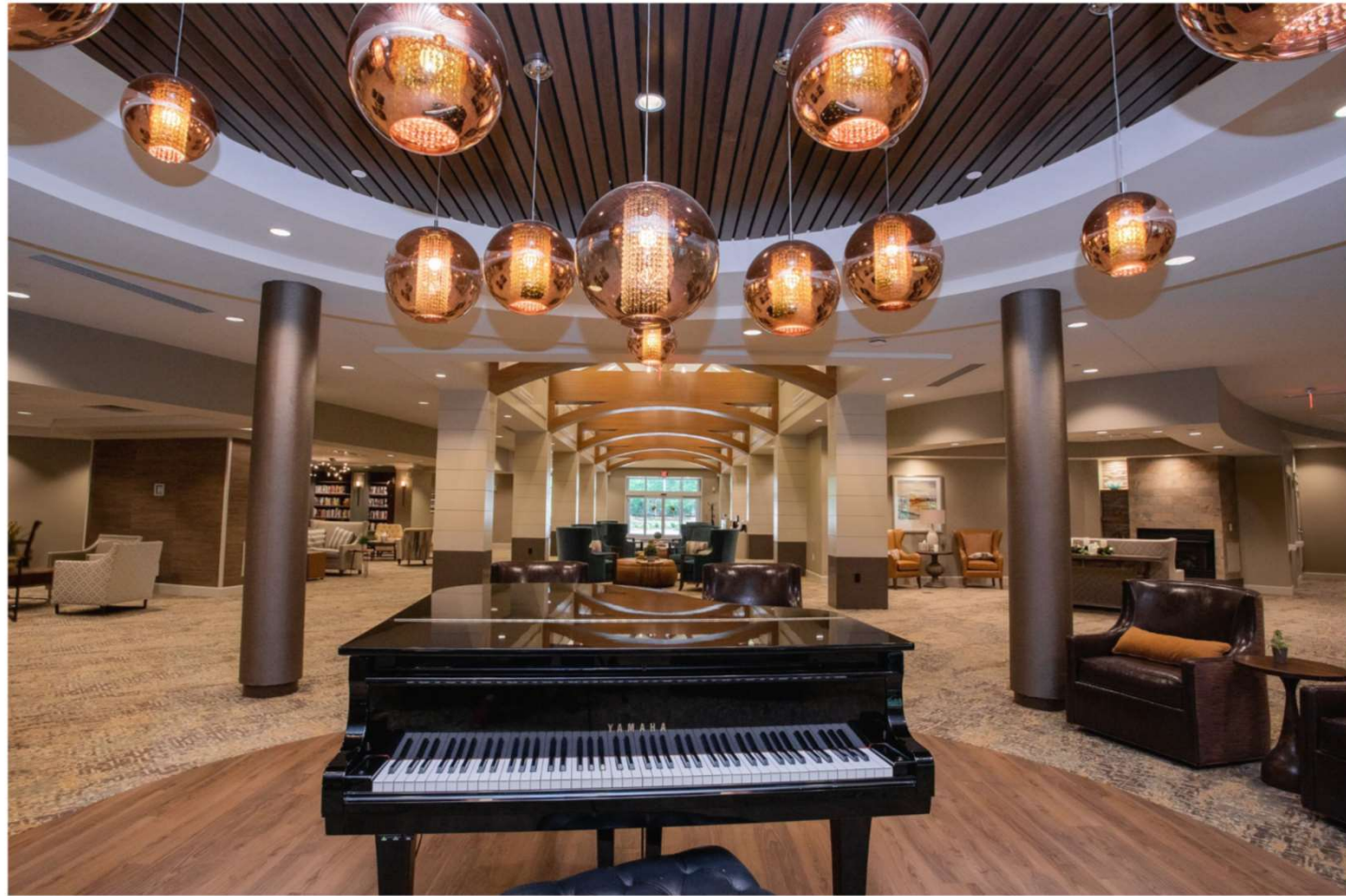
Pavilion coffee lounge





Casual Café





Piano lounge and bar





Pub with outdoor fireplace





MountainView casual dining





Chapel







## The Strategic Alliance

# Strategic Alliance

## ➤ What is it?

*“In its truest form, strategic alliances are mutually useful relationships among nonprofits and are most often intended to strengthen mission and impact by coming together for a common purpose”*

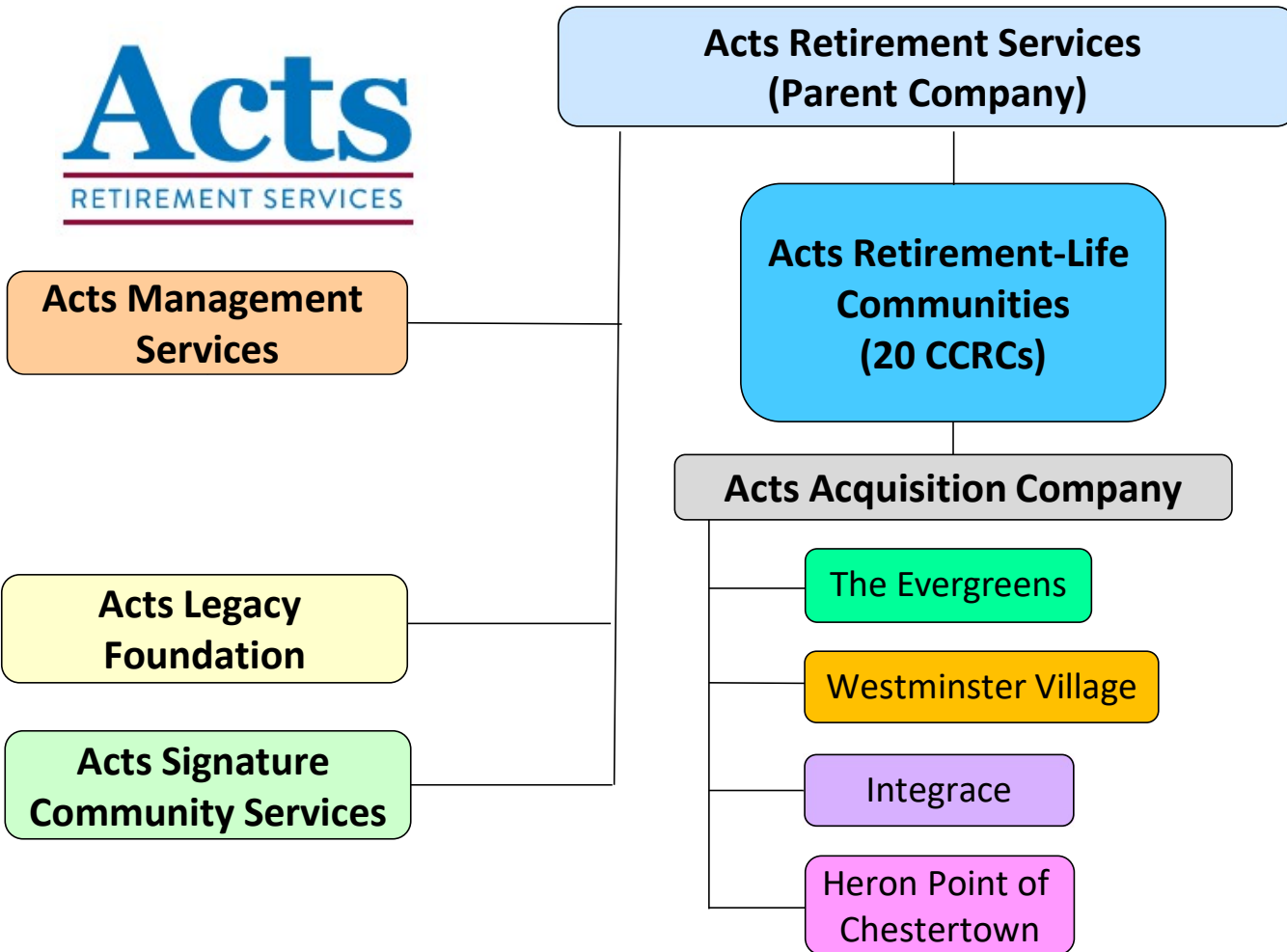
*(Boardsource, [The Strategic Alliances of Non-Profits](#), Feb 19, 2020)*

## ➤ What does it communicate?

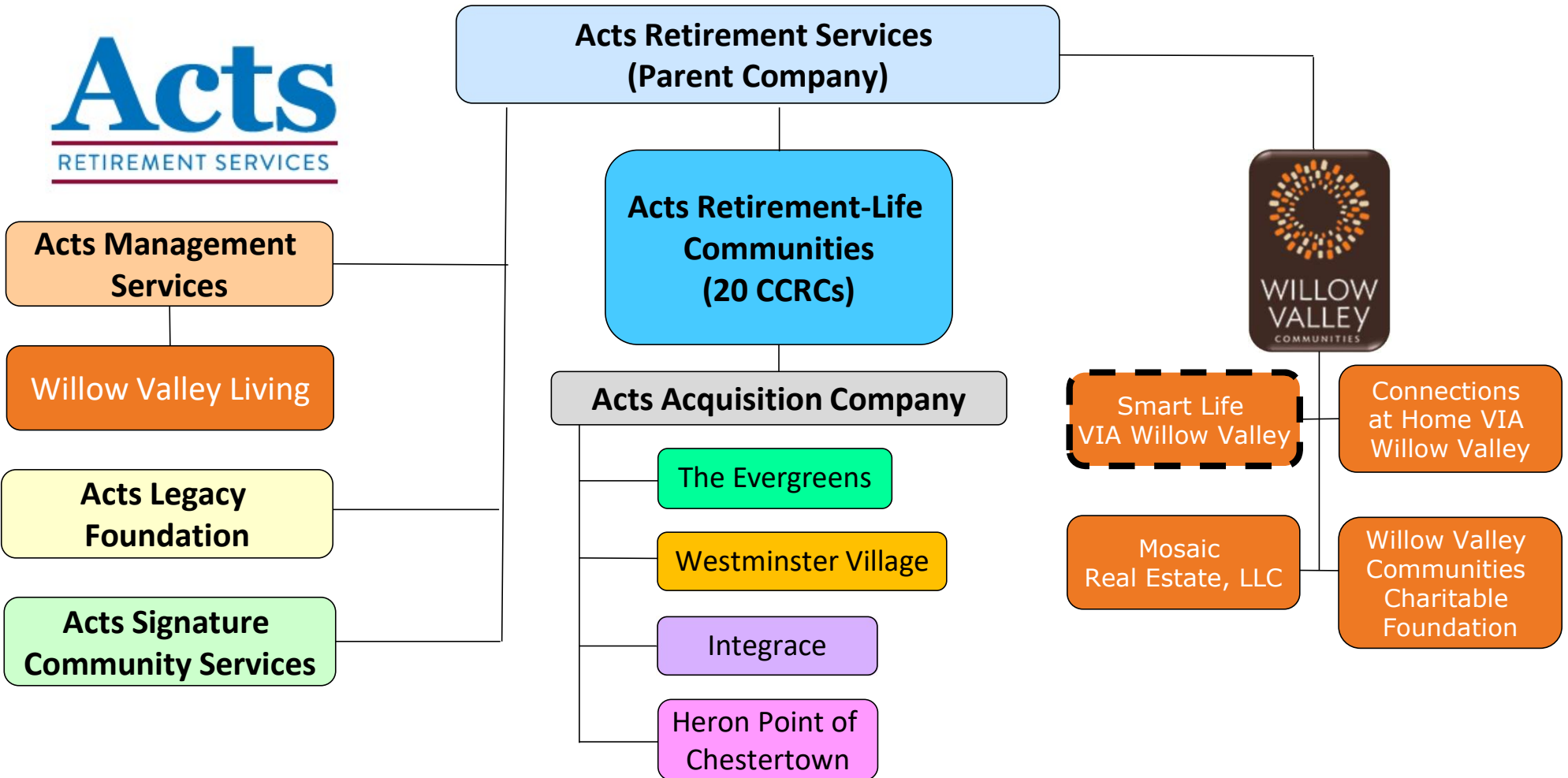
*“Two industry leaders are coming together for the benefit of their stakeholders to elevate both organizations for an even brighter future.”*



# Organizational Structure



# Organizational Structure



# Strategic Alliance

**January 1, 2022:**

- Acts leads and supports existing Willow Valley Living management team who continues management responsibility of Willow Valley Communities.
  - *John Swanson steps aside from Management to focus on Development.*
- Acts and Willow Valley work together (board and management) to plan for future enhancements and innovations. Value-added focus.
- Life continues at WVC. No disruption or changes due to the Alliance.



# Strategic Alliance

**April 1, 2022:**

- Pending approvals, new WVC board is installed, representing members from Acts and prior WVC board. Current WVC Board President Jill Gilbert continues as Chair. Acts becomes parent organization to WVC.
- Over time, this Alliance will bring new capabilities, resources and support to Willow Valley Communities.
- Willow Valley is unique. We are keeping it that way.



What Benefits Will This Provide?



# What Benefits Will This Provide?

## Opportunities and Enhancements:

- ✓ **New Approaches to Preventative Health**
  - *Nurse Practitioner Program*
- ✓ **Technology Innovations, Upgrades and Support**
- ✓ **Purchasing Power and Cost Savings**
- ✓ **Added Expertise and Resources for Willow Valley Management**
- ✓ **Employee Retention and Development**
  - *Acts Corporate University*





# Results in a Win/Win

- ✓ Partnering with a trusted organization with common mission, values and purpose
- ✓ Effectively provides a succession plan for WVL principals while keeping them engaged
- ✓ Development and vision for future continues
- ✓ Maintain and protect the Willow Valley Brand
- ✓ Strengthens the future of both organizations with minimal impact on resident life





# Willow Valley Living

*Leadership Team*



Dennis (Denny) Griest  
President



Scott Summy  
CHRO



Brian Rutter  
CMO

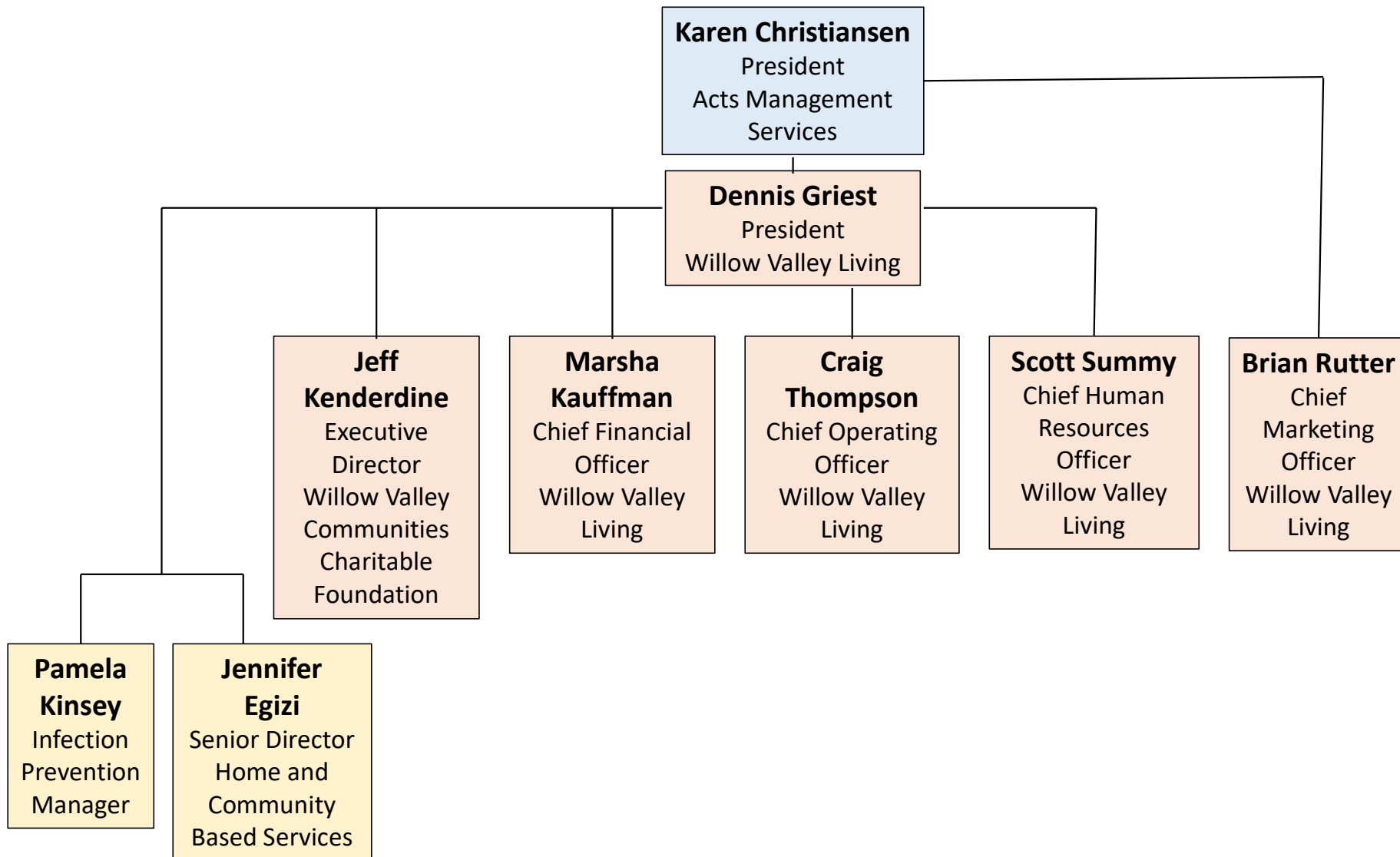


Craig Thompson  
COO

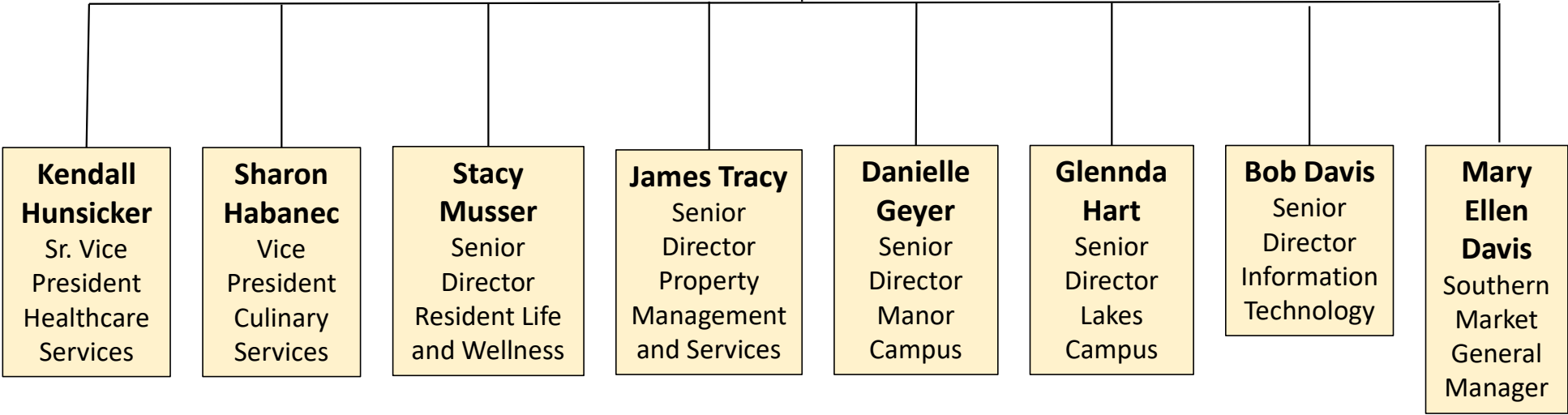


Marsha Kauffman  
CFO





**Craig Thompson**  
Chief Operating Officer  
Willow Valley Living



# Willow Valley Leadership Team

- All Willow Valley routines, practices, traditions stay in place.
- The Leadership Team of Willow Valley continues in their current roles.
- The Willow Valley Foundation continues under Jeff Kenderdine's leadership. All contributions remain solely for WVC purposes and within the WVC Foundation.
- Excited to have Acts and WVC join in this Alliance.
- Embrace the possibilities of a *Life Lived Forward*.





Conclusion



## Question & Answers