

TERRI SULT METZKER

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Terri Sult Metzker has over 20 years experience in the senior housing and care industry and currently provides consulting services to organizations involved with the development, operation or oversight of senior living facilities. Services performed include strategic and business planning; market and financial feasibility studies; the development of tools for state agencies and project sponsors/operators; assistance in the implementation of long-term care services and supports; policy and procedure manual development; and operational consulting.

PROFESSIONAL EXPERIENCE:

Strategic and Business Planning:

- Conduct strategic and business planning for organizations interested in developing a new line of business, expanding their current service offerings, or considering options to provide housing and supportive services to their constituents.
- Create business plans to provide a road map for organizations around future long-term care options, including market assessments, financial feasibility analyses, and implementation recommendations.
- Conduct focus groups and interviews as part of planning processes to understand and document the perspectives of interested parties and stakeholders with often diverse perspectives; incorporated the feedback generated into planning processes.
- Design, conduct and analyze surveys to obtain information from stakeholders in order to clarify the current status and/or preferences to incorporate into a planning process.

Statewide and National Initiatives:

- Have provided ongoing consulting services since 2005 to the GREEN HOUSE® project, a national replication initiative for an innovative model of long-term care funded by the Robert Wood Johnson Foundation, including financial modeling, staffing analysis and recommendations, and replication viability assessment.
- Developed a supportive housing guide for managed care organizations in California that will be providing long-term services and supports through the Affordable Care Act, with funding provided by the California Health Care Foundation.
- Developed a business planning guidebook and financial model for the California Health and Human Services Agency for use by newly developing Aging and Disability Resource Centers statewide.
- Was part of the contractor team for California's Assisted Living Waiver Pilot Project (ALWPP) that created the affordable assisted living program for the CA Department of Health Care Services including drafting the Medi-Cal waiver, creating the reimbursement and regulatory structure and implementing all aspects of the program over a four-year period.
- Provided technical assistance to state Medicaid and housing finance agencies, developers, and project sponsors around the development of affordable assisted living facilities as part of the Coming Home Program, a national initiative funded by the Robert Wood Johnson Foundation that resulted in the development of over 95 facilities with over 5,000 units nationwide.
- Developed the curriculum for a statewide training program funded by the Hawaii Community Foundation designed to improve the quality of care provided in small care homes located in Hawaii.

- Developed a business planning guidebook and financial model for the Alaska Department of Health and Social Services, for use by developers, providers, and funders statewide.

Financial Feasibility:

- Developed the financial feasibility model used in the Green House national replication effort by organizations interested in implementing this innovative model of care.
- Provide technical assistance with financial modeling to Green House projects in development on behalf of the national office for the Green House replication effort.
- Developed a financial feasibility model for use nationwide through the Coming Home Program, a Robert Wood Johnson Foundation-funded initiative to facilitate the development of affordable assisted living. This model allows for the analyses of multi-use projects, including assisted living, skilled nursing, independent living, senior apartments, and adult day health care.
- Developed a State-specific financial feasibility model and financial feasibility guidelines for the Vermont Department of Aging and Independent Living and the Vermont Housing Finance. Also developed state-specific financial feasibility models for state agencies in Iowa, Wisconsin and Arkansas.
- Co-authored “Affordable Assisted Living in Alaska: Honoring Traditions by Keeping Our Elders Close to Home”, a financial feasibility analysis and business plan guidebook. The financial feasibility model developed as part of this project allows for the analysis of multi-use projects, including assisted living, independent living, and leased commercial space.
- Conducted numerous financial feasibility studies for senior housing facilities nationwide.

Market Feasibility:

- Conduct market feasibility analyses for senior housing projects, including Green House or other small care homes, senior apartments, congregate care, assisted living, and memory care in both urban and rural markets.
- Co-authored “Assisted Living in Rural Markets”, a study funded by the Robert Wood Johnson Foundation on the unique characteristics of assisted living facilities located in small, rural communities and implications for market studies conducted for rural assisted living facilities.
- Developed “Market Study Guidelines for Rural Assisted Living” for NCB Capital Impact and the Iowa Finance Authority, based on case studies of several rural assisted living facilities.

Financing / Development:

- Wrote loan applications for funding through the Housing Finance Agencies in Oregon and Washington to raise capital funds for the development of assisted living facilities.
- Provide the due diligence analysis for lenders and equity investors of proposed senior care projects, including reviews of the market demand, financial feasibility studies, building design, the policy environment including the projected risk associated with Medicaid funds, and management capabilities.
- Research equity and debt funding sources for projects and developed financial feasibility analyses.
- Identify and/or evaluate potential sites for planned projects from a marketability perspective.
- Represent clients at planning and zoning meetings to present prospective projects and/or address community concerns.
- Work with architectural firms to ensure that building plans facilitate effective and efficient operations and meet market expectations.
- Developed the successful response to application for NY State HEAL grant funds that raised \$9.6 million in capital funds for an innovative eldercare development in rural New York.

Operations:

- Develop operating proformas for senior projects, including Green House homes, assisted living facilities, congregate care facilities, and independent living facilities.
- Conducted a staffing study of Green House projects on behalf of the national office for the Green House replication effort.
- Developed state-specific policy and procedure operating manuals and forms for use in numerous states.
- Developed model policy and procedure manuals for use by assisted living project sponsors in Iowa and Vermont, with funding provided through the Iowa Finance Authority and the Vermont Department of Aging and Independent Living.
- Performed operations and financial analyses for troubled assisted living facilities, making recommendations that would allow the facilities to become profitable.
- Directly oversaw the operations of over 20 senior care facilities, providing guidance and direction to the Director of Operations and Regional Managers as needed in the areas of marketing, resident care, quality assurance and building maintenance.
- Oversaw or assisted in the opening of numerous senior housing projects, including facility lease-up, staff hiring and training, resident assessments, and vendor contracts.

EMPLOYMENT HISTORY:

CHI Partners, LLC, Fair Oaks, California; 2007 to present
Vista Senior Living, Inc., Fair Oaks, California; 1999 to present
Concepts in Community Living, Inc., Portland, Oregon; 1992 - 1999
Western Medical Center, Anaheim, California; 1985 - 1990

EDUCATION:

Masters in Business Administration, Portland State University, Portland, Oregon