



2Life Communities Strategic Plan

A BLUEPRINT FOR AGING IN COMMUNITY



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PUTTING AGING IN COMMUNITY IN REACH FOR EVERYONE

A message from 2Life's Board Chair and CEO



EVERY OLDER ADULT DESERVES
THE HEALING POWER OF LIVING
IN COMMUNITY.

— AMY SCHECTMAN

We have much to be excited about! Founded as a Jewish organization nearly 60 years ago, 2Life launched an aggressive strategic plan in 2014 to build an innovative, purposeful, and stable organization with an important vision: that every older adult should have the opportunity to age in community. What does aging in community mean? It means living a full life of connection and purpose in a dynamic, supportive environment.

Toward this end, we mapped out how to expand our reach, advance the field, and strengthen our organization. Thanks to focused and determined work, we have achieved many of our original goals and made substantial progress on others.

We are now poised to further those goals and focus on:

- Modeling our tagline: *Defiantly Joyous Aging*.
- Creating environments of loving-kindness with clarity around the types of support residents need to maintain full lives in community.
- Working to move the country toward providing every older adult the opportunity to age in community.
- Build capacity to deepen philanthropic investments in our work

The charge ahead is to deepen and increase support for the community life we build, and to not only make aging in community the first choice, but also to put it within reach of everyone.

A stylized, handwritten signature of Jeffrey Sacks in black ink.

Jeffrey Sacks, Board Chair

A handwritten signature of Amy Schectman in black ink, written in a cursive style.

Amy Schectman, President & CEO

Our Mission

WE ARE ON A MISSION TO ENSURE THAT ALL OLDER ADULTS HAVE THE OPPORTUNITY TO AGE IN COMMUNITY – TO LIVE FULL LIVES OF CONNECTION AND PURPOSE IN DYNAMIC, SUPPORTIVE ENVIRONMENTS.

2Life Communities has been at the forefront of reimagining senior living since its inception in 1965. At 2Life, we believe in the power of community for optimal aging – directly confronting the twin challenges elders face of affordability and loneliness.

With the older population in the US projected to grow to 22% in 2050, 2Life's elder communities serve an increasingly significant demographic in this country. In the face of this considerable shift, we embrace the possibilities of an aging society based on accumulated wisdom, experience, and growth. Beyond our communities, we are committed to serving as a national model and hub of innovation in the arena of elder care. We intend to be life-changing for the individual residents living with us and game-changing for the broader conversation around what it means to grow older.

2Life's aging in community model ensures that older adults living on our campuses have the opportunity to live in dynamic, supportive environments, no matter their income levels. Our foundational Jewish values compel us to welcome and celebrate older adults of all life paths and backgrounds.

Guided by our core principles, our communities are a testament to the importance of engagement and connection, ensuring that seniors continue to lead vibrant, purposeful, and goal-oriented lives.

FIVE VALUES THAT GUIDE EVERYTHING WE DO

Kavod:

Honoring thy
mother and
father

Achrayut:

Welcoming
the "stranger"
as we were
once strangers
ourselves

L'dor Vador:

Sharing across
generations
respect,
kindness and
community

Tikkun Olam:

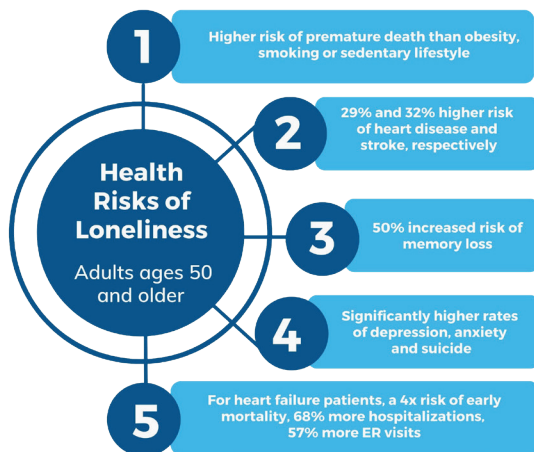
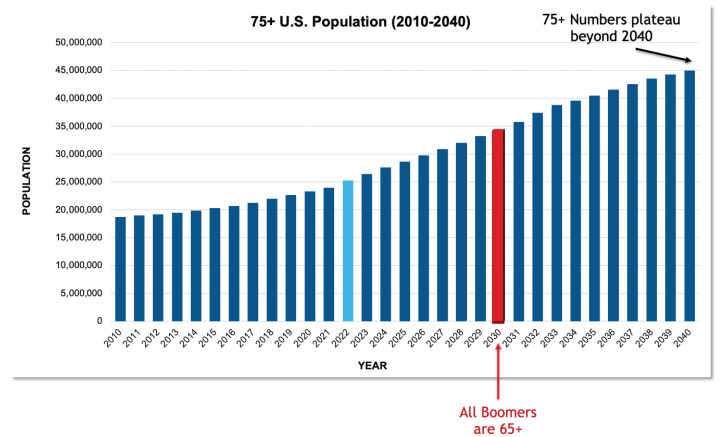
Engaging in
repairing the
world

Zakein:

Honoring the
wisdom of
our elders

EMBRACING A GENERATIONAL SHIFT

The aging of the American population is creating the largest demographic shift we've ever experienced. The baby-boom generation — the largest in America's history — is aging.



The two biggest threats to optimal aging are loneliness and affordability. The 2Life model successfully addresses both simultaneously. Simply by addressing loneliness, we increase an individual's life span by 5 years and extend the time when one can successfully perform activities of daily living without help by 59%.

Given the aging demographics and rising cost of health care, one would imagine the U.S. would be urgently creating more aging in community housing opportunities. Instead, the only place the government will guarantee to pay for housing and care is a nursing home. Before COVID-19, 89% of Americans said they'd prefer to die than to live in a nursing home. COVID undoubtedly increased that percentage.

Annual Per-Person Cost in Massachusetts

Supportive Affordable Housing

\$25,000

Nursing Home Care in MA

\$151,475

High housing costs drive nursing home placements. Massachusetts has among the highest rates of nursing home placement in the country. Many of these people could be cared for in a more residential, less expensive setting.

Sadly, unlike nursing homes, housing is not an entitlement. In the U.S., only 33% of income-eligible elders receive housing subsidy. This is bad for individuals and bad public policy. Funds that could go to building and subsidizing housing are instead diverted to the very places 90% of people don't want to live.

VISION STATEMENT

Every older adult deserves the agency and respect that aging in community offers.

Without course correction, our society will spend an exorbitant amount of money to fund places where no one wants to live. And Older Americans will find themselves unfulfilled and unable to give to the next generation. But what if we could find a way to provide affordable, desirable places for older adults to live? What if this helped government make necessary investments in schools, climate change, infrastructure, and more? Our vision is to embrace a rare alignment of interests where the less costly option is also the more desirable option — the life-giving, life-enhancing option.

According to AARP, nearly 90% of older Americans say they want to “age in place,” meaning stay in their own homes. Dr. Bill Thomas, award-winning geriatrician, and founder of The Eden Alternative® and The Green House® Project, thinks taking pride in going it alone is misguided: “This is both foolish and unsustainable,” he says. “We can do better. Aging is, and always has been, a team sport. The myth of ‘aging in place’ harms people by defining the decision to share one’s daily life with others as failure.”

We know that when older adults must spend all their time worrying how to make ends meet, society loses the chance to learn from them. 2Life addresses financial insecurity through government subsidies, creative financing, and program design. Our supportive services empower people to live long and well with us, flourishing as they engage in community life. Residents continue learning and growing by participating in arts, music, culture, and lifelong learning. They serve as mentors to youth and volunteer their time with meaningful impact.

What we hear from 2Life residents convinces us that aging in community is of significant benefit. **Ninety percent of residents would recommend a 2Life community to close friends and family.**



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**THE STAFF KNOW MY
NAME, UNDERSTAND
MY SITUATION
AND BELIEVE IN MY
GOALS FOR MYSELF.**

UNDERSTANDING THE NEED

While the supply of affordable housing is grossly insufficient for extremely low-income seniors, there are models and programs that align to support those who are lucky enough to get into subsidized housing with services and care. For those who have accumulated significant wealth, the market works to offer good choices. For seniors in the middle of the income spectrum, however, it is challenging to cover the costs of both housing and care.

We've analyzed the economics to understand affordability for optimal aging. This includes considering the anticipated costs of both care and housing — the two largest components of seniors' household budgets and the factors that most contribute to elder poverty. And we're making progress in uncovering ways to integrate housing and healthcare to further address affordability and access.

The **“Red Box Chart”** (see Appendix A) illustrates two important facts:

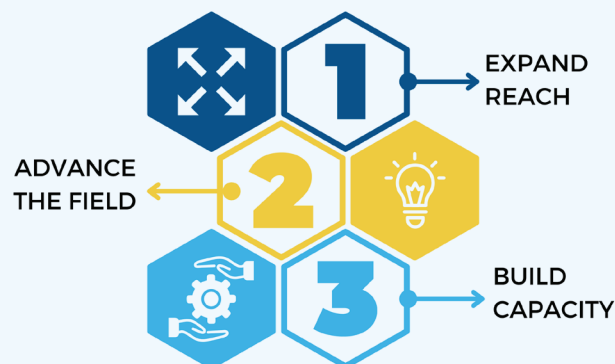
1. Low-Income Housing Tax Credits — the largest and most significant program to build affordable housing — is not aligned with programs to subsidize homecare and healthcare, causing a significant gap in society's ability to provide supports that last the lifetime of the individual. Often, seniors who have subsidized housing benefits, but not subsidized home and healthcare, are unable to maintain their housing when the need for care demands most of their income. This is illustrated by the red box.
2. Middle-income households are completely excluded from housing and care support programs and must pay for both. This is unsustainable for many when either housing prices rise or the need for expensive home care and health care arises. Even for the vast majority of older adults who fall into in the middle-income cohort, rising costs of housing and healthcare create tremendous insecurity about being able to access the basic elements required for successful aging. This is shown by the green box — no subsidies of any kind, not able to afford the market offerings.



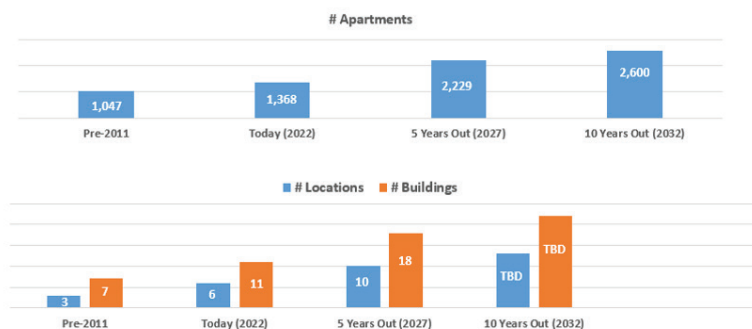
OUR PATH FORWARD

#1: EXPANDING OUR REACH

The need for deeply affordable housing remains nearly infinite, so 2Life Communities will pursue every opportunity to increase supply. We will continue to aggressively increase the number and location of subsidized senior housing apartments so our model is accessible throughout the region.

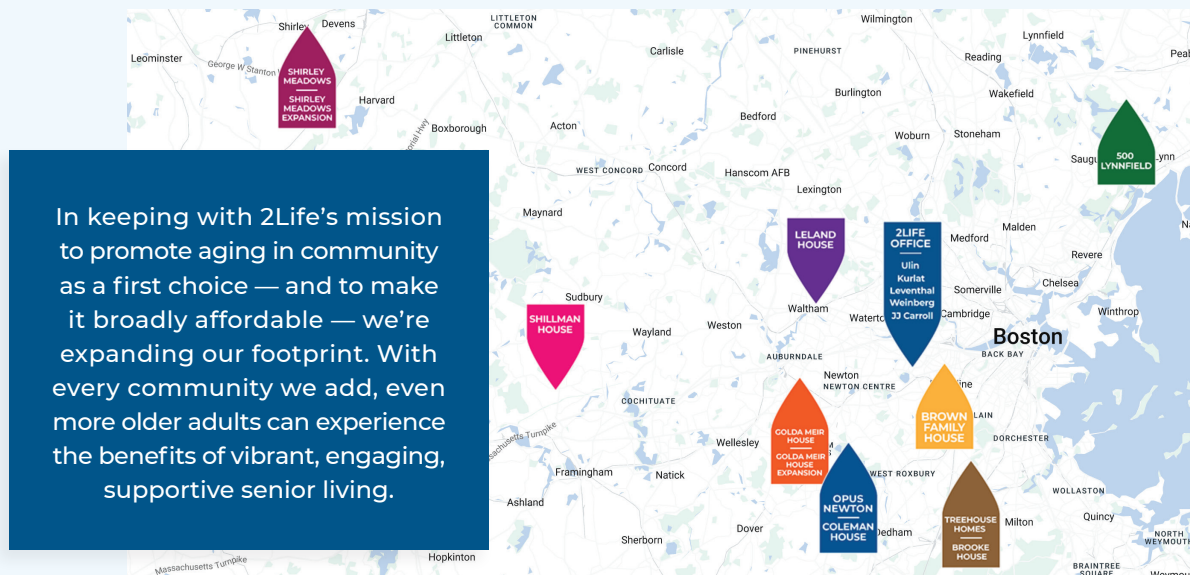


Our portfolio will double by 2027



Given our focus on broad affordability, we also are developing new models in every place where the market fails — with the goal of closing the market gaps for all older adults. This includes advancing our Opus model for middle-income housing that is as deeply supportive and forward-looking as our subsidized housing model.

2Life's expansions on existing campuses and immediate pipeline projects represent new opportunities and new geographies to serve more diverse demographics. Expanding awareness of our unique model and learning from older adults who are active in the communities we seek to serve will help us to bring defiantly joyous living to more people as we grow.



#2: ADVANCING THE FIELD

Leveraging
technology

Innovations in
Housing and
Health care

Growing our
Village Centers

Building
our Brand

Advocacy

We will use our platform, experience, and mission to innovate and to work with other dedicated organizations to improve the field of senior housing and services. We are motivated to share what we learn and how our model works. We will aggressively share our knowledge and vision. We will be leaders and a voice for good in the fields of affordable housing and senior living and services.

1. We will be intentional about using emerging technology to facilitate living well. In addition to securing access to — and support for — technology use among residents, we will explore new approaches, devices and processes that support residents' daily lives. By partnering with technology companies, academia, and residents to try out and perfect new systems, we seek to become a key resource for increasing technology access and relevance for older adults.
2. Supporting older adults to live full lives in housing requires quality health and home care, which can be most efficiently and effectively delivered in community settings. Despite the potential synergies, the current systems for housing and health care operate separately. Building on preliminary collaborations with healthcare partners, we will work to break down the funding and regulatory silos of housing and healthcare to develop effective partnership models of an integrated system. Approaching this task from a position of strength, and with a deeply rooted set of values and ethics, will enable us to serve as leaders and developers of prototypes. This requires pushing forward with measuring and documenting outcomes.



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BEFORE I CAME HERE, I USED TO WORRY ABOUT WHAT WOULD HAPPEN TO ME. NOW I LOOK FORWARD TO TOMORROW AND THE DAY AFTER — I HAVEN'T FELT THAT WAY IN A LONG TIME.

3. We will continue to make every 2Life community welcoming to our neighbors as hubs of activity and lifelong learning. We will become Village Centers where people of all ages can thrive together and advance the notion of senior housing as a precious resource for every community.
4. We will build our brand and our capacity as thought leaders, seeking opportunities to communicate and advocate for aging in community on local, regional, and national stages.
5. We will continuously reach out to government and community leaders to infuse our passion and knowledge into meaningful public policy advances.



Philanthropy

Property
ManagementDiversity Equity
and InclusionFinancial
ManagementLearning
OrganizationInvestments
in Employees

Governance

#3: BUILDING OUR CAPACITY

As 2Life continues to grow, we combine our outward-looking focus with investments to build our internal capacity to attain and sustain our vision.

1. Philanthropy plays a key role in allowing us to offer our aging in community services at all campuses and, with this strategic plan, we commit to elevating our profile here. Philanthropy is critical not only to delivering our supportive aging in community model, but also to continuing to measure, learn and innovate so that we can be leaders in identifying how best to support optimal aging. We will invest in building sophisticated fundraising capacity to broaden our support. As we articulate our case strongly and effectively, we will work to attract national foundations and major donors by connecting — through board members and community partners — to a range of leaders wishing to advance social justice for older adults.
2. With our resident-centric approach to property management and services as our foundation, we will create systems to take advantage of economies of scale and create communities of practice across all 2Life campuses. By adopting a portfolio approach to both core property management functions and programs/services, we will learn from our own and industry best practices, and mobilize organization-wide resources to deliver environments that are worthy of our precious elders.



Diversity. Equity. Inclusion. At 2Life and Beyond



3. We know we are strengthened by diversity in our staff, leadership, and residents. We commit to creating an environment that's welcoming to people of all backgrounds and cultures, recognizing our responsibility to address the harm caused by systemic racism, and to build a society based on justice and equity. Our Diversity, Equity, and Inclusion (DEI) practices will include staff and resident recruitment, attention to our economic impact, and thoughtfulness in how we show up in the world.
4. Strong financial management. There's an old saying: "no margin, no mission." We take great care to manage our finances to preserve and build resources so we will have emergency funds at the ready (the pandemic underscored the importance of this); be able to invest in R&D (such as with OPUS); have equity capital to invest in building to our own high standards for accessibility and community life; and treat employees as the treasures they are and the foundation of our excellence.
5. While we celebrate our successes, we always want to systematically reflect on our practice. We will grow as a learning organization by using data and program evaluation to inform our work and seek continuous improvement, and will share our learnings broadly both within our organization and in the larger community.
6. Investing in our employees to make the workplace rewarding and engaging. This includes meaningful professional development, opportunities for internal advancement, and equitable compensation.
7. As we grow and expand both our portfolio and organization, we are committed to review and adjust our governance structure to ensure the best possible outcomes and alignment among our policies, values and operations.

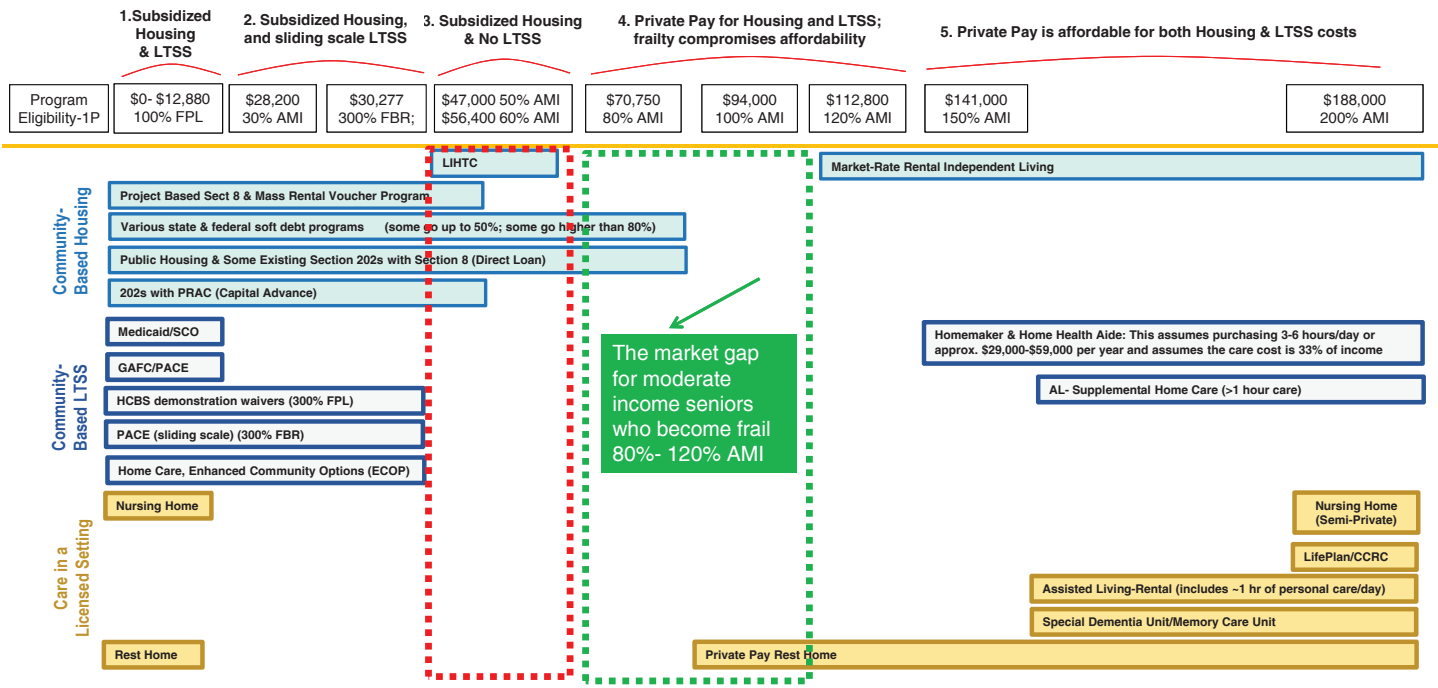


Today we stand ready

to implement a new phase of our mission as an organization. It has never been more important, timely or right. We are proud of where we are, and humbled by where we must go and how urgently we must go there to make the difference we are capable of making in the lives of older adults and in the world. With continued intellect, hard work, partnerships, and the support of donors who recognize and commit to the importance of this work, we will forge **ONWARD!**

Eligibility for Elderly Affordable Housing & Long Term Services and Supports (LTSS)

State of Massachusetts 2021



Red Box Chart



To learn more about 2Life Communities or to explore ways you,
your company or organization can partner in our mission,
visit 2LifeCommunities.org or call 617-912-8400.

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*2Life Communities Inc. is a not-for-profit 501(c)(3) organization.
Donations are tax deductible as allowed by law. Tax ID: 04-2478888*

