October 4, 2021

Town of Greenwich
Purchasing Department
101 Field Point Road
Greenwich, CT 06830

Re: Final Update, Non-Binding Bid
Proposal for Acquisition of The Nathaniel Witherell (the “Center”)

To Whom It May Concern:

Allaire Health Services is pleased to submit this proposal for acquiring The Nathaniel Witherell skilled nursing facility in Greenwich, CT (“Center”). We have reviewed available information, including information that was submitted to the Data Room recently, for the Center’s facilities, conducted our own independent research, and are prepared to build upon the historical performance of the Center. Leveraging existing programs and initiating new models of progressive clinical care and residential service, Allaire looks forward to building strong partnerships as an extension of the Center with local and regional hospitals, providers, and other businesses in support of the wellness and ongoing care of patients and residents of the Center. We also look forward to introducing new clinical programs that will further extend the value that these facilities bring to the community.

Allaire Health Services is prepared to invest in the Center to improve further upon the aesthetics of the building(s) and to bring new clinical services to the environment that will bolster capabilities and overall performance. As a company, Allaire Health Services places an intensive focus on delivering an upscale patient experience that fuses expert subacute rehabilitation and skilled nursing care. Allaire actively pursues collaboration with local hospital systems to improve transitions of care and mitigate risk for patients. Allaire is committed to building meaningful clinical collaborations with local physicians and healthcare organizations to improve the lives and clinical wellbeing of those it is fortunate to serve.

After significant discussion with Town of Greenwich officials and careful, ongoing evaluation of existing services and with an intention to elevate services, clinical capabilities, and local/regional
partnerships, Allaire Health Services proposes to assume operations and advancement of the Center under the structure of a long-term operating lease. We understand this structure to be in the best interest of all parties, and this model is consistent with other operational acquisitions we have undertaken. Our proposed lease structure leverages a risk/reward model that enables Allaire and the Town of Greenwich to enjoy the benefits of shared accountability for maintaining and improving upon organizational performance – in particular clinical quality. Based upon Allaire’s overall organizational strength and our enthusiasm for the opportunity that exists with the Center, we are prepared to close this transaction without involving any type of third-party financing.

The details of our company and our lease offering are contained within this document. Allaire agrees to all terms and conditions included within the initial Request for Proposal, and we look forward to your review and next steps in the acquisition and advancement of these highly regarded facilities.

Sincerely,

[Signature]

Ben Kurland
President and CEO
Allaire Health Services
Proposal of Terms – Allaire Health Services
Lease, Leadership, and Operations of The Nathaniel Witherell

Allaire is dedicated to the provision of high quality, safe care to all patients and residents. Allaire has embraced guidance from the Institute of Medicine and is committed to continuous improvement of quality and safety for patients and residents. Recognizing that the creation of a “culture of safety” begins with having staff members who are fully engaged and trained in all aspects of safety and quality management, Allaire’s leadership team works continuously to break down communication barriers and create an environment where any employee or clinical team member can raise concerns or ask questions – of any team member, including physicians.

Following the premises of Six Sigma, LEAN, and Agile, Allaire creates annual performance and quality plans. These plans are communicated to all team members, and opportunities for continuous improvement are identified and discussed. To facilitate delivery of high-quality care, Allaire deploys a well-trained, highly effective clinical and administrative team in each of its facilities. Allaire’s commitment to ongoing staff training and development ensures that staff members are properly educated on various clinical conditions and associated management strategies. The commitment to ongoing staff development also leads to a more engaged workforce, which is correlated with better quality and clinical outcomes.

In all ways, Allaire is completely aligned with the goals of the Town of Greenwich in ensuring that patients and residents at The Nathaniel Witherell receive nothing but the best possible care at the highest possible quality. Allaire is also able to entertain creative engagement structures, of which a lease of the facility and providing management oversight and direction are desirable options.

Lease Payments and Capital Expenditures:

1. Allaire will support variable rent terms related to the lease of The Nathaniel Witherell facility on a percentage of EBITDAR. Allaire is intensively focused on the development of programs and staffing models that ensure clinical quality is at the highest possible level, with the goal being that clinical quality be consistently at a 5-star rating. Allaire proposes the following terms related to rent, variable to improved CMS Quality Measure scores (QM):
   a. 15% of EBITDAR above $500,000 if QM’s are 3-stars
   b. 10% of EBITDAR above $500,000 if QM’s are 4-stars
   c. 5% of EBITDAR above $500,000 if QM’s are 5-stars
   Rent payments will be adjusted quarterly based upon CMS’s updating of its star ratings. Allaire and the Town of Greenwich will collectively determine how EBITDAR will be calculated – i.e., prior year audited financial statements or running financial statements based upon current operations.

2. Allaire is committed to the ongoing improvement of The Nathaniel Witherell facility and associated equipment and infrastructure. To this end, Allaire will commit to ensuring that all necessary facility and infrastructure needs are addressed in a timely manner. In addition, Allaire is committed to advancing the overall capabilities of various existing and new clinical programs
through investment in clinical equipment. Allaire has made significant investment in each of its facilities, and The Nathaniel Witherell facility will be treated no differently than any other facility under Allaire’s ownership and/or operations.

a. Allaire commits to escrow an amount consistent with what has been invested in other Allaire facilities, pending review of the referenced Physical and Capital Needs Assessment (PCNA) which will be performed by a mutually commissioned engineering firm. Upon receipt and collective review of the PCNA report, Allaire and the Town of Greenwich will mutually agree upon what investment commitment is reasonable to place under escrow.

b. Allaire reserves the right to make further investment in capital equipment which will be to the benefit of the existing or target patient and resident population(s). Capital equipment funds will not be subject to escrow and will be administered exclusively by Allaire in service to patients and defined clinical programs.

Lease Term:

Due to the significant amount of capital that Allaire will commit to investing in The Nathaniel Witherell facility and associated clinical programs, Allaire suggests an initial term of 25 years with an additional 25-year option, at Allaire’s discretion.

Quality Covenants:

Allaire is committed to ensuring that patient care quality is maintained at a high level. Allaire recognizes that clinical quality is a surrogate of staff engagement. To this end, Allaire commits to ensuring that staffing is maintained at appropriate levels and that staff are afforded opportunities to grow within roles and to advance knowledge and capabilities within the environment of care.

1. Allaire commits to doing its utmost to maintain overall staffing at a 5-star level and anticipates not using agency staffing for any required positions.
2. Allaire commits to maintaining clinical quality at no less than a 3-star level and anticipates clinical quality being at a 5-star level.
3. Allaire commits to ensuring that all inspections and surveys bear results with as few deficiencies as possible, with none being higher than a G-level.
   a. Should any inspection or survey result in a finding at G-level, Allaire will be given the opportunity to address and remedy the issue within a reasonable time period (determined by mutual agreement and based upon issue severity).
   b. Allaire commits to remedy of any Immediate Jeopardy (IJ) citations within 5 days.
4. Allaire commits to regular meetings with Town of Greenwich officials to review performance and outcomes details for The Nathaniel Witherell and associated clinical programs.
5. Allaire commits to working in good faith with The Nathaniel Witherell Family Council.
Reporting:

Allaire’s business model in working with County or Town owned facilities, regardless of Change of Ownership or Management Services Agreement, involves significant communication and transparency. Allaire is committed to and expects to hold regular meetings with Town of Greenwich officials to discuss and review performance and overall progress of clinical and residential services at The Nathaniel Witherell. Allaire anticipates providing any and all survey and inspection reports to Town of Greenwich officials after initial review with associated corrective action plans, should there be anything noted as being in need of correction or improvement.

1. Allaire will provide quarterly summary reports to Town of Greenwich officials related, but not limited to:  
   a. Survey details related to facility and operations from external inspectors  
   b. Patient/Resident census and payor mix  
   c. Allaire’s standard operations/financial performance reports for the facility  
   d. Any litigation reports or details – in process or pending

2. Allaire will provide annual audited financial statements for the operation of the facility.

3. Allaire will provide summary details of budget and financial plans for upcoming year.

4. Allaire will provide immediate reports related to any inspection or survey findings.

Asset Maintenance, Guarantor and Transfers:

Allaire is committed to the ongoing maintenance and operations of The Nathaniel Witherell and to investing in continuous improvement in the facility’s appearance, facade, and overall infrastructure. Allaire is equally committed to maintaining and upgrading patient and resident related equipment and other such items required to enhance patient and resident experience.

1. Allaire will provide a 2-year capital plan that is mutually agreeable to the Town of Greenwich and Allaire’s plans for operational improvement and facilities enhancement.

2. Allaire will address any concerns not already addressed that may be identified as part of a Town of Greenwich commissioned PCNA.

3. All obligations under the lease will be guaranteed by Allaire and specifically Benjamin Kurland.

4. Allaire will not transfer any controlling interest to another party, as this would be inconsistent with Allaire’s business model.

Defaults and Termination:

Allaire agrees that the Town of Greenwich shall have the right to terminate the lease agreement for The Nathaniel Witherell should any of the aforementioned commitments not be upheld. Allaire requests that any (unanticipated) default be addressable via a reasonable time period for cure. Allaire never anticipates any issues with relation to its ownership and/or management of any of its facilities but recognizes that there are occasional issues that arise. To this end, Allaire is committed to the rapid and reasonable
resolution to any concerns that the parties identify together or are identified via an independent survey or inspection. As such, Allaire expects there to be no reason or grounds for default or termination.

Concurrently, Allaire requests that it be granted the right of first refusal for any transactional matters related to The Nathaniel Witherell facility or any aspect thereof.

**Executive Leadership Team:**

The following individuals will be directly involved in the advancement of Allaire’s assumption of operations and ongoing leadership of The Nathaniel Witherell facility:

<table>
<thead>
<tr>
<th>Name</th>
<th>Title</th>
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<tbody>
<tr>
<td>Ben Kurland</td>
<td>President/Chief Executive Officer</td>
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<tr>
<td>Chava Goldschmidt</td>
<td>Chief Nursing Officer</td>
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<tr>
<td>Kyle Kramer</td>
<td>Chief Strategy Officer</td>
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<tr>
<td>Bill Mettler</td>
<td>Chief Financial Officer</td>
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<tr>
<td>Chaim Brecher</td>
<td>Vice President of Finance</td>
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<tr>
<td>Kate Anderegg</td>
<td>Vice President of Business Development</td>
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<tr>
<td>Ahron Lieberman</td>
<td>Director of Operations</td>
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<tr>
<td>Phyllisann Sperato</td>
<td>Director of Human Resources</td>
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Other members of the Allaire team will be involved in issue specific initiative, but the above team will provide forward leadership to facilitate the transition to Allaire and ensure that The Nathaniel Witherell facility continues to advance its services and offerings to patients, residents, and the broader Greenwich and Southern Connecticut market.

**Conclusion:**

Allaire is confident that the terms and conditions contained herein, which will be further expanded and clarified in formal contractual documents, will offer the Town of Greenwich and The Nathaniel Witherell a flexible model of ownership and management services that provide a Win/Win opportunity for the Town of Greenwich and residents/patients at The Nathaniel Witherell. Allaire and its leadership team look forward to taking next steps and demonstrating to the Town of Greenwich its commitment to patient care excellence and to partnering with you to advance services and capabilities at The Nathaniel Witherell.
Allaire Health Services
Background and Qualifications

Allaire Health Services, based in Central New Jersey, was founded in 2015 by Benjamin Kurland with the idea to create a unique environment of care for individuals who require short- and long-term care. Allaire’s pathway to excellence started with a single facility in Freehold, New Jersey and has evolved to include seven facilities in four states. Allaire’s strategy for growth begins with identifying the right facility through significant due diligence and development of a direct understanding of the market in which the facility exists. Allaire has worked with County facilities, as well as privately held facilities, and the approach is the same—transform culture, engage employees, align with physicians and hospitals, and create a level of excellence that patients, residents, and families expect and deserve.

Allaire has a strong track record of transforming healthcare centers, building on their strengths and providing the resources needed to flourish. As a new era in healthcare services evolves, community and family will continue to be integral in Allaire’s care strategies. Allaire has a deep appreciation for the fact that patients and families have a choice when it comes to nursing and rehabilitative care. As a result, Allaire works closely with patients, families, and members of the community to understand needs and expectations and to develop programs and services that are tailored to each site it operates.

Allaire is equally committed to partnering with hospitals and health systems, serving as an extension of the inpatient continuum of care and offering patients and their physicians the opportunity to progress clinically and achieve target outcomes. Allaire works closely with hospitals and health systems to identify areas of opportunity for collective improvement for patients, regardless of condition. Through leveraging the development of relationships with local hospitals and health systems, along with a strong focus on population needs, Allaire is able to formulate plans centered on key clinical conditions and bring resources to bear to meet the needs of patients and residents. This level of planning detail also provides a strong foundation upon which to engage hospital, health system, and physician leaders—largely by demonstrating a formal commitment to addressing critical needs in the patient care community.

Allaire recognizes that hospitals and health systems have heightened their focus on transitional care management, with the rise of accountable care and the advancement of strategies to bundle services, inclusive of rehabilitation and skilled nursing care. Successful organizations are actively assessing care strategies along with their patient identification methods and developing partnerships to manage patient risk and long-term care in a proactive manner. From the outset of care, organizations are now mindful of what resources may be needed along the care path, as
well as contemplating what resources may prove beneficial to longer-term maintenance. Allaire focuses its strategic and operational planning efforts on the same principles of highly focused and effective care that is cost effective and in keeping with overarching health and wellness improvement goals for the population being served.

Allaire’s overarching goals are focused on ensuring long-term health and continuity of care. This strategy requires active engagement of physicians and nursing staff, along with a health partnership with local hospitals and health systems. Allaire expects to be fully engaged with local physicians and hospitals in the long-term management of patients, following hospital-developed clinical protocols to ensure quality outcomes for their patients. To this end, Allaire focuses on the implementation of quality-focused, evidence-based strategies and protocols.

In doing its part to manage the continuum of care and prevent avoidable hospitalizations, Allaire focuses intensively on the following areas:

- Patient Engagement,
- Clinical Management,
- Intervention and Education, and
- Ongoing Maintenance and Wellness

Each of these areas is integral to achieving the best possible outcomes for patients and residents, as well as promoting active and productive partnerships with physicians and local hospitals. Allaire’s expertise and perspective is applied in collaboration with physicians and clinical leaders from the hospital. This collaboration is directly intended to improve overall clinical care and to avoid unnecessary readmissions. In partnering with physicians and hospitals, Allaire ensures a comprehensive review of all points along the delivery continuum, the improvement of care delivery, and the maintenance of a positive connection with patients, thereby increasing ability to address community needs and overall wellness.

Allaire has implemented structured collaboration with physicians, hospitals, and health systems in all the nursing and rehabilitation centers it has acquired. This type of structured partnership has led to Allaire’s inclusion as a preferred provider in hospital developed Accountable Care Organizations (ACOs). Allaire’s collaborative approach has resulted in better outcomes, increased patient satisfaction, improved quality ratings, and enhanced financial performance.
Allaire Portfolio of Facilities and Organizational Leadership

Allaire has proven experience in significantly enhancing quality of care, staff engagement, and financial performance within each of the facilities that have become part of the Allaire family of facilities. Allaire works closely with existing staff and supplements as necessary to ensure that residents and patients have access to services required to make a full recovery and live comfortably. Allaire also performs a comprehensive population study of current residents and the general market to understand what services beyond the existing complement will be of benefit to the facility and to the broader community. Through implementation of new programs that enhance existing services to existing residents and broaden the facility’s reach into the community, Allaire expands access to clinical services and provides an improved opportunity for patients and residents to achieve a better state of wellness and enjoy life.

Allaire’s approach to expanding its reach and adding new facilities to the organization is focused largely on its mission to provide high quality, population-focused clinical services to patients and residents. Regardless of corporate financial structure, Allaire’s goals remain the same – to improve the lives and health status of those we are privileged to serve, to enhance the experience of patients and residents, and to provide services in a highly cost-effective manner.

Allaire’s philosophy is not just to acquire healthcare facilities but, rather, transform them to grow organically, making sure that each facility has all the resources it needs to flourish. Many operators spread themselves very thin both organizationally and geographically. Allaire owns and operates facilities in New Jersey, Pennsylvania, New York, and Vermont with great success. At the core of Allaire’s success is a commitment to being a direct participant in the community.
Allaire’s approach to acquisition of new facilities is straightforward and directed towards increasing stability and focus within the direct care team, engaging residents and patients in wellness focused management strategies, and identifying areas of opportunity to continuously improve clinical services and financial performance. Allaire is administratively nimble and capable of adapting to any situation and is well positioned to work with local government, physicians, hospitals, and other care providers to enhance services and meet the needs of the broader community. As a regional healthcare provider, Allaire is committed to maintaining a concentrated presence in the Northeast that allows its management team to be intimately involved in the ongoing operations of each facility.

Within Allaire’s portfolio of facilities, there are specialized programs geared towards advancement of respiratory care, cardiac care, neurological care, and orthopedic and musculoskeletal care. Through developing focused programs that align with the needs of local and regional hospitals, Allaire is able to partner with leading physicians to implement care strategies that enable targeted improvement in clinical status of patients and residents, while concurrently enabling growth and development opportunities for staff in the expansion of their skills and knowledge around various clinical conditions.

Allaire’s approach to patient management is an extension of clinical processes and protocols in leading hospitals and health systems across the country. Through focusing on conditions that are common amongst the population and partnering with local hospitals, health systems, and physicians, Allaire is able to provide patients and residents with access to the most current thinking in patient management for their personal situation. Ultimately, the goal is to enable patients to achieve their best possible life status through focused patient care management, leveraging the concepts of holistic wellness and advanced medical therapy. This approach positions Allaire as a unique provider in the space of short- and long-term residency care.

Using an organized planning approach to program development and implementation, Allaire ensures that all aspects of patient and market identification are addressed and that programs address the true needs of all stakeholders involved in care delivery, specifically patients and residents. The primary goal of using such a focused approach is to ensure that no details are missed in the design and implementation of new processes and protocols. This process serves to inspire confidence amongst the clinical team, as the care givers are directly involved in identifying what needs to be done to ensure success for patients and residents.
The entire clinical program development process is grounded in a deep commitment to delivering care that matters for patients and residents and increases value for the overarching healthcare system. Through directly engaging and integrating physicians, nurses, and clinicians in program development, Allaire ensures currency in thinking about care delivery. Allaire also provides an organizational structure that allows for creativity and clinical leadership, which enables higher levels of engagement and the production of strategies that serve the clinical population and advance the organization. In addition, Allaire focuses on building relationships through the physician, hospital, health system, and broader community to ensure that there is an understanding and appreciation for the resources that are available to patients and residents aimed at clinical advancement and personal improvement. Allaire also has an intensive focus on differentiating itself as a care provider organization. It is not enough to provide good care – Allaire focuses on providing care that matters, makes a difference in the lives of its patients and residents, and allows them to achieve a better life status.

With an intentionally flat leadership structure, Allaire can move nimbly to make investments for improving overall environment, equipment, and services to benefit residents. Capitalizing upon performance management and improvement tools such as Six Sigma, LEAN, and AGILE, Allaire’s leadership and strategy team quickly assesses facilities on an environmental and performance basis. More importantly, Allaire’s leadership engages with a very hands-on approach, directly participating with community leaders, local/regional hospitals, patients/residents, and the physician community to identify areas of opportunity for service elevation and enhancement. Allaire then moves quickly to implementation, inspiring confidence with patients/residents, family members, and the clinical community.
Allaire’s leadership team has a 15-year track record of efficient administration of Nursing Homes. Putting efficient systems in place and implementing sound administrative procedures, the Allaire team has taken over facilities – some of them facing financial struggles, some with poor reputation, and all of them with great untapped potential – that called for turning them around by putting together strong clinical teams and offering specialized clinical programs tailored to the specific needs of each community.

Allaire Health Services is structured as a Limited Liability Corporation and is wholly owned by Ben Kurland.

Allaire’s leadership team includes:

Ben Kurland, President and Chief Executive Officer  
Bill Mettler, Chief Financial Officer  
Chava Goldschmidt, Chief Nursing Officer  
Kyle Kramer, Chief Strategy Officer  
Chaim Brecher, Vice President of Finance  
Kate Anderegg, Vice President of Business Development  
Benzion Nussbaum, Director of IT & Electronic Health Records  
Ahron Lieberman, Director of Operations  
Lorraine Nixon, Accounts Payable  
Carl Hinrichs, Director of Respiratory Care  
Blimi Avi, Director of Accounts Receivable  
Chaya Schwed, Director of Rehabilitation Services  
Phyllisann Sperato, Director of Human Resources  
Darcy Domingues, Director of Nutrition and Dietetic Services  
Joseph Fish, Director of Patient Experience

A formal company organizational chart is included as Appendix D.

Facilities under direct ownership and/or operation by Allaire’s leadership team include:

Allaire Rehab & Nursing in Freehold, New Jersey  
Morris View Healthcare Center in Morristown, New Jersey  
Grandview Nursing & Rehabilitation Center in Danville, Pennsylvania  
Grove Park Healthcare and Rehabilitation Center in East Orange, New Jersey  
Center for Nursing and Rehabilitation in Hoosick Falls, New York  
The Center for Living and Rehabilitation in Bennington, Vermont
Morristown Post Acute in Morristown, New Jersey

Allaire Rehab & Nursing in Freehold and Morris View Healthcare Center in Morristown were both previously county owned facilities. In each case, Allaire leadership partnered with county administration to ensure a seamless transition and an elevated ability to provide care for continuing residents and patients. Allaire’s overarching care philosophy was implemented in both of these facilities with great success, and both facilities are now strong performers within the Allaire portfolio of facilities. What has contributed greatly to the initial turnaround and continued advancement has been an ongoing relationship with county administration and health officials. This partnership has enabled bi-directional communication, a sense of shared ownership of the healthcare needs of the target population(s), and increased ability to ensure that key programs are able to be implemented on a population needs basis. Details related to financial performance improvements are included as Appendix A.

Facilities within which Allaire’s leadership team has an invested partnership and has provided direct guidance to acquisition and turnaround include the following sites:

- Aristacare at Whiting
- Aristacare at Cherry Hill
- Aristacare at Manchester

Within each of these facilities, Allaire’s leadership has provided significant impact on clinical quality and enhancement of resident and family satisfaction with services. Of equal note is the improvement in financial performance for each facility that Allaire has acquired, thereby enabling continued investment in facilities improvement, addition of necessary equipment and infrastructure improvement, and the addition of new clinical services. Allaire’s strategy for identifying strong communities with which to partner and facilities that need improved management services creates an ideal circumstance within which to deliver the type of performance improvement shown in the attached financial statements.

Should Allaire be awarded the opportunity to assume operations of the Center, a leadership team will be assigned to manage the transition and support ongoing operations. Allaire does not outsource management operations. Allaire’s leadership team commits to being intimately involved in ongoing operations. This commitment stems from a strong belief that direct involvement promotes a better environment of care, creates stronger relationships with clinicians and staff, and ensures a better experience for patients and residents. In addition, direct involvement in each facility – from top to bottom – allows the Allaire team to have a meaningful
presence and identify opportunities for ongoing program development and performance improvement.

To ensure a smooth transition into new ownership, Allaire’s entire leadership team will be involved in overseeing the transaction and onboarding of employees, advancing new services, and making determinations on what improvements and new programs are needed to meet the needs of the market.

**Quality of Care / Patient Safety**

Allaire is dedicated to the provision of high quality, safe care to all patients and residents. Allaire has embraced guidance from the Institute of Medicine and is committed to continuous improvement of quality and safety for patients and residents. Recognizing that the creation of a “culture of safety” begins with having staff members who are fully engaged and trained in all aspects of safety and quality management, Allaire’s leadership team works continuously to break down communication barriers and create an environment where any employee or clinical team member can raise concerns or ask questions – of any team member, including physicians.

Allaire team members are continuously trained and educated on their role in ensuring that patients and residents receive care according to current clinical practice guidelines. Following the premises of Six Sigma, LEAN, and Agile, Allaire creates annual performance and quality plans. These plans are communicated to all team members, and opportunities for continuous improvement are identified and discussed.

To facilitate delivery of high-quality care, Allaire deploys a well-trained, highly effective clinical and administrative team in each of its facilities. Allaire’s commitment to ongoing staff training and development ensures that staff members are properly educated on various clinical conditions and associated management strategies. The commitment to ongoing staff development also leads to a more engaged workforce, which is correlated with better quality and clinical outcomes.
Allaire partners with local and regional hospitals to ensure continuity of care for patients with chronic conditions (i.e., Heart Failure, COPD, Asthma, Diabetes) and works with hospital specialty teams (i.e., Cardiovascular, Neurosciences, Orthopedics and Musculoskeletal) to ensure that each patient continues to progress in his or her plan of care.

Because Allaire is interested in serving as a strong continuing care partner for local and regional hospitals, Allaire works to develop strong relationships with clinical program leaders and invites physician leaders to participate in helping Allaire continuously learn and improve its operations and overall care delivery strategies.

Allaire maintains focused policies on care delivery and issue management. Allaire also surveys patients, residents, and families regularly to understand what impressions are being made and to learn where there may be opportunities for improvement.

Allaire utilizes four satisfaction surveys:

1. Internal satisfaction surveys conducted by Director of Quality Experience
   a. “1st Week Review” survey that is crucial in terms of facilitating a smooth transition for the patient/resident. This survey allows administration to obtain information regarding the residents individualized needs and preferences, additionally allowing it to assess if Allaire’s “home-like environment” is actually perceived as such by the Resident/Patient.
   b. “1st Month Review” survey that assesses patient/resident satisfaction once they have had a chance to acclimate to the environment.

2. Surveys conducted twice a year and reviewed by the facility’s Administrator.

3. A discharge survey designed to assess the overall quality experience as perceived by the Resident/Patient and their family members.

4. An external survey conducted by a third party for every discharge
   a. The designated third party is Core Q and the surveys are conducted for every discharge, one week after discharge.
   b. The Administrator receives the completed survey, follows up if there are any requests, deciding which staff member is best positioned to resolve any questions or concerns.
Allaire intends to maintain existing programs and services available at the Centers. This includes programs related to the care of patients/residents with Alzheimer’s disease. In caring for the dementia population, Allaire utilizes professionals who are certified in dementia care (i.e., Certified Dementia Practitioners – CDP). Allaire offers training for this certification to all staff members and encourages staff members to pursue the certification as part of ongoing personal growth and development. In addition to Alzheimer’s management, Allaire plans to implement/elevate focused programs in cardiovascular care and wellness, orthopedics and musculoskeletal health, movement and mobility enhancement, exercise and nutrition, among others.

Upon acquisition, Allaire will immediately perform a thorough assessment of the existing patient and resident population, as well as assessing regional population and health needs. Allaire will evaluate existing clinical relationships with local and regional hospitals, and through this process, Allaire will work to co-develop programs that serve to enhance care and service availability to residents. Allaire will also determine what programs and services can be standardized with what is already in existence at its other facilities.

The following is a list of clinical programs Allaire has developed in collaboration with hospital partners, including Geisinger Medical System, Atlantic Health System, and Meridian Health:

- **Horizons Program for the Care of Individuals with Neurological Injury**: a comprehensive program designed to provide for the long-term needs of young adults with neurologic impairment secondary to injury or illness. The program offers medical oversight by a neurologist; pharmacologic management by a psychiatrist; mental health management by a neuropsychologist; group therapies; and specialized recreational therapy, including adaptive technology laboratory. Allaire provides CBIS (Certified Brain Injury Specialist) certification to all caregivers that work in the program.

- **Cardiovascular Wellness Program**: a transitional care program with an emphasis on empowering the patient in his/her wellness management. Key elements of the program include medical and medication management by cardiac NP; patient education; social supports assessment; diet management; mental health services; and community discharge management. Staff education focuses on early detection and early intervention.

- **COPD Management Program**: a clinical program aimed at reducing risk of readmission due to COPD exacerbation. A pulmonologist provides medical surveillance, and clinical protocols encourage early detection and early intervention.

- **Post-Acute LVAD (Left Ventricular Assist Device) Program**: Post-acute and long-term care of patients who have received a LVAD, either as a bridge to transplant or as destination
therapy. Cardiac NP provides surveillance, and staff education focuses on device management, early identification of complications, and seamless communication with the LVAD team.

- **Mobile Health / Paramedicine Program**: a pilot program to determine whether paramedics can be utilized for specific clinical procedures as a means of avoiding unnecessary admissions.
- **Hospitalist Orientation Program**: a pilot program aimed at educating hospitalists about the SNF setting, breaking down silos in care, and creating dialogue across the continuum.

In addition to these programs, Allaire is currently working on post-surgical orthopedic, peritoneal dialysis, and stroke rehabilitation programs. These clinical programs, coupled with a focus on clinical competency and staff engagement, allow for continually improving patient outcomes. A sampling of these outcomes is represented in Appendix F.

Allaire intends to ensure that patients and residents can receive the care they require onsite, whenever possible. The nature of the population in residence is such that transporting to offsite offices or other clinical facilities creates unnecessary risk for the patient or resident. For this reason, partnerships with local and regional physicians and clinical service providers are important to long-term success and positive clinical outcomes. To the extent that Allaire can bring physician and associated clinical ancillary services required by patients and residents onto the respective campuses, risk is mitigated, and patient/resident satisfaction is significantly enhanced.

As part of ongoing operations and exploration, Allaire will evaluate the potential for creating a focused primary care and wellness clinic on each campus to serve the needs of patients and residents. Allaire will also provide daily dietary, physical, and social wellness opportunities for residents as part of ensuring a balanced lifestyle.

**Hospital / Health System Partnerships**

Allaire has embarked on a highly deliberate and strategic growth plan, evaluating opportunities to expand its portfolio of facilities on a weekly basis. Key to considering any facility is the ability for Allaire’s executive team to be directly engaged in a hands-on manner as part of the acquisition, onboarding, and advancement of clinical and operational strategies that enable improved performance. Allaire is particularly interested in working with hospital-affiliated facilities. Allaire has been vetted by multiple not-for-profit organizations, including both counties and hospitals, and maintains close partnerships with hospitals local to its facilities. Specifically, Allaire has developed strong bi-directional partnerships with three health systems – Geisinger...
Health, Southwestern Vermont Health Care, and Atlantic Health – aimed at increasing shared accountability for patient outcomes, clinical performance, and overall value. Details related to key collaboration efforts are contained in Appendix B.

**County Transactions**

**Allaire Rehab and Nursing; Morris View Healthcare Center**

Allaire’s first two facilities – Allaire-Freehold and Morris View – were county facilities. In neither of these acquisitions was there a pricing adjustment from initial offer to the point of closing. This is largely due to the level of due diligence that Allaire conducts in developing pricing proposals to ensure that pricing is on point with the market and fairly represents the opportunity for facility and clinical program development that exists therein.

In the case of Allaire-Freehold, Allaire worked closely with county officials to assess the situation with both facilities and implement necessary improvements to elevate overall performance – clinically, operationally, and financially. Allaire was able to close the transaction with Monmouth County in two (2) months and through significant effort, the facility has moved from being a facility that was historically low on the referral preference list to being a regional referral destination for patients, especially those with neurological issues. While Allaire now owns the facility, a close working relationship with Monmouth County officials continues to be in place.

Allaire’s Morris View facility was an underperforming facility and was losing money on operations. Allaire was engaged by Morris County and ultimately acquired the operations of the facility. Through extensive engagement work with staff and the introduction of formal programs in Cardiac Care, Orthopedic/Musculoskeletal Care, and Pulmonary/Respiratory Care, the facility has evolved into a 5-star facility. Morris County has extended Allaire’s lease on the Morris View building, and Allaire continues to maintain a very strong working partnership with Morris County officials.

**Hospital Collaborations**

**Grandview Nursing & Rehabilitation; Morristown Post Acute; Centers for Living and Rehab; Center for Nursing and Rehabilitation**

When Allaire acquired Grandview Nursing & Rehabilitation in Danville, Pennsylvania, the Allaire team quickly assessed all aspects of Grandview’s operations. Intent on elevating the quality of care, Allaire conducted purposeful work sessions with the clinical teams,
top management executives, and leading staff members of the Geisinger Health System. One of the many positive outcomes of these working sessions is the ability to utilize Geisinger physicians and services within the Grandview facility. This has created a formal connection with one of the region’s leading hospitals and health systems and has allowed Allaire to introduce new clinical programs more effectively and efficiently to better meet the needs of patients and residents. The relationship with Geisinger has also allowed Allaire to streamline care and make it significantly more cost effective, by reducing duplicative services. Grandview was one of fifteen SNFs across the entirety of Geisinger’s service area invited to participate in Geisinger’s ACO.

In collaboration with Geisinger Medical Center, Allaire has had the opportunity to introduce several innovative clinical programs that coincide with patient and resident clinical needs. Allaire is specifically focusing on elevating clinical management capabilities in cardiovascular care, pulmonary care, and orthopedics/musculoskeletal care. Allaire has added telemedicine capabilities to its portfolio of services for patients and residents to ensure rapid access to physicians and clinicians. A sampling of clinical program elements is included as Appendix E.

More recently, Allaire has acquired Morris Hills Center for Nursing and Rehabilitation in Morristown, New Jersey and has rebranded the facility as Morristown Post Acute. As the facility is immediately across the street from Morristown Medical center, the tertiary and quaternary hub for Atlantic Health, Allaire has developed a collaborative partnership with Atlantic Health and Morristown Medical Center. The focus of the building will be extending clinical care processes and protocols from Atlantic Health into the Morristown Post Acute facility for patients with Cardiovascular and Pulmonary/Respiratory conditions. In addition, the organizations will jointly collaborate on the advancement of a formal Transitional Care Unit for patients who no longer require hospital level services but will benefit from continuing their care advancement under close supervision.

Clinical and Administrative team members from Allaire and Atlantic Health are collaborating to develop processes that streamline transitions of care and elevate overall services offerings in cardiac and pulmonary care to ensure that patients experience a seamless transition from one environment to the next and that their clinical course of care continues expeditiously. A unique aspect of this relationship will be the fact that clinical teams can round on patients at both facilities as part of continuing care efforts. In addition, staff will be bi-directionally trained to ensure integration into both environments.
Ultimately, the relationship between Allaire and Atlantic Health, similar to the relationship with Geisinger, demonstrates the Allaire approach to collaboration with hospitals, health systems, and physicians to ensure that patients receive the care they need and have access to the best resources available.

A similar relationship structure, with joint engagement and collaboration, is being implemented with Southwestern Vermont Health Care. In particular, Allaire and Southwestern Vermont Health Care have focused on bringing existing services and contracts into the Allaire model of care. The relationship structure is unique in that Southwestern Vermont Health Care remains an invested owner in the facilities at a 20 percent position. Over the course of five years, Allaire has the opportunity to buy down Southwestern Vermont Health Care’s ownership stake based upon achievement of predetermined quality and performance standards. The creation of a bi-directional accountability structure enables both parties to participate actively in the advancement of clinical service offerings, elevate performance collaboratively, and operate the facilities in a manner that meets the goals of both parties. In addition, Allaire has retained medical leadership and staffing from Southwestern Vermont Health Care to ensure continuity of patient care and to ensure continued institutional alignment.

**Management Agreements / “Turnarounds”**

**New Grove Manor; Brighton Rehab and Wellness Center**

Allaire assumed management responsibility for New Grove Manor in July 2019, after the facility had been on the Special Focus Facility list for 15 months. Allaire was initially engaged via an “at risk” management contract. Allaire immediately engaged in a comprehensive and aggressive assessment of all aspects of performance – operational, clinical, and financial. Staff were engaged in education regarding care strategies that enable patients to achieve improved clinical status and advancement of their wellbeing. In addition, Allaire focused intensively on all aspects of cost management. Capitalizing upon structured contracting and leveraging economies of scale across all its facilities, Allaire has been successful in improving the overall cost position of the facility, so much so that the facility has improved to the point of yielding a modest profit on monthly operations. In January 2020, the facility was moved to CMS’s Improving Facility list, indicating that Allaire’s interventions had begun to pay dividends. Through continued focus and direct engagement on all levels, Allaire successfully advanced the facility to CMS’s Graduated Facility list on March 23, 2020.
The turnaround at Grove Park, to move from Special Focus to Graduated, took Allaire a short and intense nine (9) months. While proud of this work, Allaire recognizes that the real work has just begun. With the facility in an improved position financially, the management team can now begin the process of investing further in staff development, relationship cultivation with local and regional hospitals and physicians, and improvement of overall patient satisfaction and overall perceptions of care. Current ratings for clinical quality are at 4-star, and Allaire is focused on improving this even further.

In addition to Allaire’s work at New Grove Manor, the Pennsylvania Department of Health engaged Allaire Health Management services to provide critical interim leadership services at the Brighton Rehab and Wellness Center (Beaver, PA). The Brighton facility made headlines as the epicenter of a huge COVID-19 outbreak, and the Pennsylvania Department of Health engaged Allaire to rapidly assess the situation related to clinical care, develop short-term action plans, and implement improvements related to patient management as part of turning the clinical situation around at the facility. Over the course of its engagement, Allaire instituted the following actions:

**Initial Assessment and Outbreak Management:**
The Allaire team provided guidance and hands-on assistance with managing and curtailing an extensive COVID-19 outbreak. Immediately upon assuming temporary management responsibility and authority, infection control policies were updated to reflect the most recent CDC guidance regarding COVID-19 management in long-term care facilities. Staff members were directed to utilize full PPE, including gowns and N95 respirators, at all times in the facility. The Allaire team provided education regarding COVID-19 transmission-based precautions, donning and doffing PPE, and hand hygiene. With the assistance of the National Guard, within one week of the temporary management agreement, a comprehensive cohorting plan was implemented to effectively separate COVID-positive residents from COVID-negative residents. Routine surveillance testing of staff and residents was initiated to ensure early detection of cases. A hotline was set up to provide daily COVID-19 updates to residents, families, and staff. Less than three weeks after completing the cohorting plan, transmission within the facility ceased, with no new identified cases. As of June 15, all COVID-19 cases had been resolved.

**Plan of Correction:**
The Allaire team provided seasoned nursing and long-term care operations executives that provided onsite visits to assess, develop and monitor significant COVID-19 infection control deficiencies. This included infection control trainings, assessment and audit tools and ongoing coaching and mentoring of the Brighton clinical team. Allaire provided CMS- and CDC-based infection control training modules, and then provided ‘train the trainer’ sessions with key clinical team members, including infection preventionist, director of staff development, director of
nursing and unit managers. Ongoing audits of the electronic medical records (PCC) were conducted daily.

The Allaire team provided oversight of infection control related environmental deficiencies. This included daily observation of infection control standards in housekeeping and laundry departments and extended through maintenance and food service departments. Allaire provided approximately 48 unique infection control audits, with recommendations, ongoing trainings and protocols.

Allaire co-authored plans of correction for cited deficiencies and assisted the administrator and staff with all aspects of compliance. A COVID-19 resource and policy binder was organized with key information. The COVID-19 binder was monitored and updated by Allaire Health Services.

**Operations:**

During the Plan of Correction audits, it was discovered that many required systems were not in place or did not meet regulatory standards. The following required elements were reintroduced:

A) Hazard Communication Plan  
B) Safety Data Sheets  
C) Integrated Pest Management Plan- Four Step Plan  
D) Coordination of Contract with Pest Management Company  
E) OSHA standards (areas of safety, employee education, eye wash stations)  
F) Training and competency testing, and infection control systems, in the laundry department  
G) Management of Work Order Completion (went from 150 work orders previous 3 months to 767 work orders since May 19, 2020.  
H) Kitchen Audits - equipment repairs, plumbing needs, and pest management strategies  
I) PPE Burn Calculator - daily review  
J) COVID-19 Swab Testing process and documentation  
K) Communication with residents, staff, and families regarding COVID-19 data, management, and preventive measures  
L) Communication with residents and families regarding grievances / concerns  
M) QAPI Program – education with managers on QAPI process, initiation of routine QAPI meetings, and utilization of formal PIPs to address identified areas of concern  
N) Employee education calendar and tracking system  
O) Clinical Pathways Support:  
   a) Daily virtual review of reportable events, care plans, infectious diseases
b) Hands on and virtual support in areas of COVID-19 management - cohorting plans, evaluating health care status of residents, routine testing, PPE protocol for affected and unaffected units

c) Meeting with clinical teams, CMS, PA DHSS, Brighton’s Medical Director to provide input, guidance, and evaluation of clinical pathways

d) Attendance at clinical rounds and meetings

e) Introduction of “clinical huddle” on all units, every shift, to improve communication and ensure dissemination of key education / information

**Experience with COVID-19**

Like skilled nursing facilities across the country, Allaire has been forced to deal directly with the COVID-19 pandemic. Early in March, Allaire was asked by Atlantic Health and Morristown Medical Center to set up a COVID-19 care unit at the Morristown Post Acute facility, which is located directly across the street from Morristown Medical Center. Allaire clinical team members worked in partnership with providers from Morristown Medical Center to ensure prompt and appropriate care for patients from Morristown Medical Center with COVID-19. Leveraging its Transitional Care Unit within the Morristown Post Acute site, Allaire was quickly able to establish a dedicated facility in support of Morristown Medical Center, including acquisition of all necessary Personal Protective Equipment, linens, and other required clinical resources to ensure seamless, ongoing care of patients.

In November, several months after discharging its final COVID-positive patient, Allaire was asked to reinstitute its COVID-19 unit at Morristown Post Acute in Morristown, NJ by Atlantic Health and Morristown Medical Center in anticipation of a second wave of COVID-19 diagnoses and the associated influx of patients. With more treatment options available this time around, Morristown Post Acute worked with Atlantic to implement clinical protocols for Remdesivir administration and monoclonal antibody infusion at the post-acute center.

To date, Morristown Post Acute has admitted 144 COVID-positive patients to its COVID unit, with an 86% recovery rate.

Ultimately, Allaire’s success in each of its facilities is borne out of a strong commitment to patients and residents and built off strong collaboration with hospitals, health systems, and physicians. Allaire’s approach to population assessment and program development is driven by the development of a deep understanding of the market and its participants. Specifically, Allaire reviews detailed information regarding proximal hospitals and health systems to understand
their primary discharge diagnoses and then develops program constructs that tailor to the needs of patients being discharges from prospective partner hospitals and health systems.

Allaire further works to develop an appreciation for who are the key physicians within any of its markets. Allaire has a strong desire to collaborate with highly engaged and reputable physician providers, serving as a conduit for clinical care continuity. In the setting of the Center, Allaire is genuinely interested in maintaining existing clinical relationships and expanding further with local and regional hospital programs as new programs and service offerings are developed. In addition, Allaire evaluate existing arrangements for providing ancillary services – i.e., laboratory, imaging, pharmacy, etc. – to ensure that patient care capabilities are maintained at the highest possible levels. As a company, Allaire does not own ancillary services offerings, as this is an area of collaborative opportunity and a situation whereby hospitals and health systems have the ability to offer ancillary services more efficiently and effectively than Allaire. Moreover, the hospital ancillary programs are equipped with top end imaging and laboratory equipment, thereby enabling higher quality studies and more accurate test result.

Transition Plan:

Should Allaire be awarded the opportunity to acquire the Center, a leadership team will be assigned to manage the transition and support ongoing operations. Allaire does not outsource management operations. Allaire’s leadership team commits to being intimately involved in ongoing operations. This commitment stems from a strong belief that direct involvement promotes a better environment of care, creates stronger relationships with clinicians and staff, and ensures a better experience for patients and residents. In addition, direct involvement in each facility – from top to bottom – allows the Allaire team to have a meaningful presence and identify opportunities for ongoing program development and performance improvement.

To ensure a smooth transition into new ownership, Allaire’s entire leadership team will be involved in overseeing the transaction and onboarding of employees, advancing new services, and making determinations on what improvements and new programs are needed to meet the needs of the market.

Labor and Personnel:

Allaire’s fundamental premise is that the quality of the employees directly correlates to the quality and level of care that the residents receive. Allaire appreciates the role that continuity of care plays in the peace of mind and wellbeing of patients and residents. The best way to achieve
peace of mind through a transition is to ensure that patients and residents see the same staff members they have become used to working with on a daily basis.

In a recent acquisition, Allaire offered permanent employment to 95 percent of the existing nursing staff. Not only were these staff members offered continuing employment, they were offered an increase in their compensation as they transitioned to employment with the new ownership team. The five (5) percent of nursing staff members who did not transition to the new ownership team chose to retire or accepted positions elsewhere. From an overall employment perspective, Allaire has a history of maintaining 97 percent of employees that were with the prior owner/operator.

Should Allaire be afforded the opportunity to acquire the Center, it will be Allaire’s intention to offer employment to all current employees that pass required background checks and are interested in and committed to being part of a progressive clinical care team and Allaire Health Services. With each employment offer, Allaire will honor current rates for compensation and will also honor tenure relative to its paid time off program. Allaire will offer a benefits program that is consistent with industry standards and reasonably comparable to what is presently in place. With specific regard to retirement benefits, Allaire will offer employees the opportunity to participate in a qualified 401k retirement plan through Fidelity Investments, which will be based upon defined contribution.

Upon joining the Allaire team, employees will undergo training to understand and embrace Allaire’s culture of engagement and safety. Employees will also be afforded access to additional training and personal/clinical advancement opportunities.

Once these individuals become a part of Allaire, they will be part of ongoing performance management and evaluation. The intention of Allaire’s performance management program is to continuously cultivate a sense of pride, commitment, and focus such that patients and residents receive the benefit of a fully engaged care team. Allaire will bring forward continuing education programs focused on patient satisfaction and customer service, efficient operations, and ongoing evolution within the care delivery market. Allaire will also bring forward new clinical programs and processes that will enable staff to learn new applications of delivery and to gain new skills and knowledge about how their actions and efforts influence overall health and wellness for the patients and residents that Allaire is privileged to serve.

Allaire is committed to building a strong rapport with employees at the Center and will implement programs that enable each employee to be fully engaged and empowered to deliver the best possible care and services to patients and residents. Allaire invests in the development
of its team members, offering opportunities for progressive development and advancement of skills that serve to enhance employees’ ability to participate as active members of the care continuum.

Allaire prides itself on the ability to cultivate teams that are fully engaged in the mission and vision of the organization. Within the Center, Allaire will introduce its culture and demonstrate to employees an unwavering commitment to excellence and employee development. Through implementing its culture and engaging its employees in a positive and productive manner, the Allaire team will collectively improve the experience for employees at the facility and concurrently improve the experience for patients and residents.

**Admissions Policies:**

To accommodate and streamline admissions, Allaire relies on trained in-house Nursing Supervisors who are available 24 hours a day, 7 days a week to be able to assess potential admissions at all times. Allaire leverages high-end technology to drive opportunities to streamline the patient identification, evaluation/assessment, and admissions process. Allaire is committed to ensuring that patients and their families not wait for decisions or determinations on admission or placement at one of its facilities. Also key to Allaire’s ability to accommodate direct admissions is the company’s web-based system to run financials and for referrals through AllScripts, CuraSpan, and soon to be EPIC.

Allaire is committed to providing admission to any patient that qualifies clinically for its services, regardless of financial status or ability to pay. Allaire has an extremely broad patient acceptance policy. Allaire assesses prospective patients and residents on the basis of clinical need and the ability of the facility to meet and exceed those clinical service needs. Allaire works closely with patients and families to accommodate specific requests regarding placement, especially in the setting of double occupancy rooms. Allaire also works with patients and families to ensure, to every extent possible, a fit with the overall environment of care.

Allaire strives to coordinate with local and regional hospitals and utilize as many services (ancillary services - labs, radiology, physicians, services, and specialties) as possible in order to streamline the care delivery to patients and residents. Allaire makes a concerted effort to ensure that patients are able to maintain their existing physician relationships to better serve continuity of care. When an admission from the hospital is taking place, Allaire conducts, when possible, an onsite assessment to gain as much information as possible to ensure as smooth a transition, develop key relationships in the event of a patient needing re-hospitalization.
Allaire currently utilizes the PatientPing Program to interface with acute care health systems. Designed to enable better communication across the patients’ care teams, PatientPing allows Allaire to improve care quality and assure safer, seamless transitions. Through PatientPing, the care coordinators, primary care physicians and the entire care team receives real-time notifications when patients are admitted, discharged, and transferred, thus integrating the transitions of care and seamlessly consolidating the information necessary for high-quality patient care.

Relative to admissions, Allaire recognizes that the Center has the potential to serve as a highly regarded, priority long-term care and rehabilitation facility for residents in the community. Under Allaire’s structure, management will work closely with staff and regional physicians and clinicians to continuously build the collaborative care model and elevate reputation through expansion of clinical services while focusing intensively on quality and resident/family satisfaction. Through these efforts, the Center will retain and advance a position of leadership in the service of patients and residents that require ongoing care and living services.

From an ongoing operations perspective, Allaire will continue to participate in those programs that are presently part of the operations of the Center. In addition, Allaire will introduce new programs and further cultivate relationships throughout the region as part of ensuring that each facility is a preferred destination for patient referral.

**Quality of Care:**

Allaire is dedicated to the provision of high quality, safe care to all patients and residents. Allaire has embraced guidance from the Institute of Medicine and is committed to continuous improvement of quality and safety for patients and residents. Recognizing that the creation of a “culture of safety” begins with having staff members who are fully engaged and trained in all aspects of safety and quality management, Allaire’s leadership team works continuously to break down communication barriers and create an environment where any employee or clinical team member can raise concerns or ask questions – of any team member, including physicians.

Allaire team members are continuously trained and educated on their role in ensuring that patients and residents receive care according to current clinical practice guidelines. Following the premises of Six Sigma, LEAN, and Agile, Allaire creates annual performance and quality plans. These plans are communicated to all team members, and opportunities for continuous improvement are identified and discussed.
To facilitate delivery of high-quality care, Allaire deploys a well-trained, highly effective clinical and administrative team in each of its facilities. Allaire’s commitment to ongoing staff training and development ensures that staff members are properly educated on various clinical conditions and associated management strategies. The commitment to ongoing staff development also leads to a more engaged workforce, which is correlated with better quality and clinical outcomes.

Allaire partners with local and regional hospitals to ensure continuity of care for patients with chronic conditions (i.e., Heart Failure, COPD, Asthma, Diabetes) and works with hospital specialty teams (i.e., Cardiovascular, Neurosciences, Orthopedics and Musculoskeletal) to ensure that each patient continues to progress in his or her plan of care.

Because Allaire is interested in serving as a strong continuing care partner for local and regional hospitals, Allaire works to develop strong relationships with clinical program leaders and invites physician leaders to participate in helping Allaire continuously learn and improve its operations and overall care delivery strategies.

Allaire maintains focused policies on care delivery and issue management. Allaire also surveys patients, residents, and families regularly to understand what impressions are being made and to learn where there may be opportunities for improvement.

Allaire utilizes four satisfaction surveys:

5. Internal satisfaction surveys conducted by Director of Quality Experience
   a. “1st Week Review” survey that is crucial in terms of facilitating a smooth transition for the patient/resident. This survey allows administration to obtain information regarding the residents individualized needs and preferences, additionally allowing it to assess if Allaire’s “home-like environment” is actually perceived as such by the Resident/Patient.
   b. “1st Month Review” survey that assesses patient/resident satisfaction once they have had a chance to acclimate to the environment.
6. Surveys conducted twice a year and reviewed by the facility’s Administrator.

7. A discharge survey designed to assess the overall quality experience as perceived by the Resident/Patient and their family members.

8. An external survey conducted by a third party for every discharge
   a. The designated third party is Core Q and the surveys are conducted for every discharge, one week after discharge.
   b. The Administrator receives the completed survey, follows up if there are any requests, deciding which staff member is best positioned to resolve any questions or concerns.

Allaire intends to maintain existing programs and services available at the Center. This includes programs related to the care of patients/residents with Alzheimer’s disease. In caring for the dementia population, Allaire utilizes professionals who are certified in dementia care (i.e., Certified Dementia Practitioners – CDP). Allaire offers training for this certification to all staff members and encourages staff members to pursue the certification as part of ongoing personal growth and development. In addition to Alzheimer’s management, Allaire plans to implement/elevate focused programs in cardiovascular care and wellness, orthopedics and musculoskeletal health, movement and mobility enhancement, exercise and nutrition, among others.

Upon acquisition, Allaire will immediately perform a thorough assessment of the existing patient and resident population, as well as assessing regional population and health needs. Allaire will evaluate existing clinical relationships with local and regional hospitals, and through this process, Allaire will work to co-develop programs that serve to enhance care and service availability to residents. Allaire will also determine what programs and services can be standardized with what is already in existence at its other facilities.

The following is a list of clinical programs Allaire has developed in collaboration with hospital partners, including Geisinger Medical System, Atlantic Health System, and Meridian Health:

- *Horizons Program for the Care of Individuals with Neurological Injury*: a comprehensive program designed to provide for the long-term needs of young adults with neurologic impairment secondary to injury or illness. The program offers medical oversight by a neurologist; pharmacologic management by a psychiatrist; mental health management by a neuropsychologist; group therapies; and specialized recreational therapy, including
adaptive technology laboratory. Allaire provides CBIS (Certified Brain Injury Specialist) certification to all caregivers that work in the program.

- **Cardiovascular Wellness Program**: a transitional care program with an emphasis on empowering the patient in his/her wellness management. Key elements of the program include medical and medication management by cardiac NP; patient education; social supports assessment; diet management; mental health services; and community discharge management. Staff education focuses on early detection and early intervention.
- **COPD Management Program**: a clinical program aimed at reducing risk of readmission due to COPD exacerbation. A pulmonologist provides medical surveillance, and clinical protocols encourage early detection and early intervention.
- **Post-Acute LVAD (Left Ventricular Assist Device) Program**: Post-acute and long-term care of patients who have received a LVAD, either as a bridge to transplant or as destination therapy. Cardiac NP provides surveillance, and staff education focuses on device management, early identification of complications, and seamless communication with the LVAD team.
- **Mobile Health / Paramedicine Program**: a pilot program to determine whether paramedics can be utilized for specific clinical procedures as a means of avoiding unnecessary admissions.
- **Hospitalist Orientation Program**: a pilot program aimed at educating hospitalists about the SNF setting, breaking down silos in care, and creating dialogue across the continuum.

In addition to these programs, Allaire is currently working on post-surgical orthopedic, peritoneal dialysis, and stroke rehabilitation programs.

Allaire intends to ensure that patients and residents can receive the care they require onsite, whenever possible. The nature of the population in residence is such that transporting to offsite offices or other clinical facilities creates unnecessary risk for the patient or resident. For this reason, partnerships with local and regional physicians and clinical service providers are important to long-term success and positive clinical outcomes. To the extent that Allaire can bring physician and associated clinical ancillary services required by patients and residents onto the respective campuses, risk is mitigated, and patient/resident satisfaction is significantly enhanced.

As part of ongoing operations and exploration, Allaire will evaluate the potential for creating a focused primary care and wellness clinic on each campus to serve the needs of patients and residents. Allaire will also provide daily dietary, physical, and social wellness opportunities for residents as part of ensuring a balanced lifestyle.
Appendix A

Key Collaboration Examples

- Geisinger Medical Center
- Southwestern Vermont Health Care
- Atlantic Health – Morristown Medical Center
- Pennsylvania Department of Health
Geisinger Medical Center

When Allaire Health Services took over its Grandview facility in North Central Pennsylvania, there was limited interaction with the Geisinger Medical Center in Danville, Pennsylvania. Recognizing the need for clinical partnership, physician leadership, and patient sourcing, Allaire leadership engaged directly with leaders from Geisinger in discussions on how the two organizations could achieve mutual benefit in service to the population of patients treated at the Medical Center and across the Danville region.

Through collaborative meetings and exploration of organizational needs, Allaire and Geisinger embarked together on a plan to increase access for patients with severe heart failure to an environment of care that supports the active management of a progressive care regimen that includes dietary management, exercise and cardiac rehabilitation, and continuing cardiovascular wellness education. In particular, there was a recognized need for being able to transition patients with an implanted ventricular assist device for cardiac support outside the hospital for continued care progression and potential return to home.

Allaire and Geisinger collaborated to develop processes and protocols in support of ventricular assist device patients. The implantation of the care plan for this patient population included training on dressing changes, battery management, and overall care strategies for patients with implanted cardiac assist devices. Allaire staff members were educated on how to work with patients on a clinical and psychosocial level, as well as learning what to look for in terms of clinical progression or regression. The program has been active for multiple years, and Geisinger now utilizes the Allaire Grandview facility almost exclusively for its cardiac care population, especially those who are part of the advanced heart failure program.

In addition to supporting the cardiac population, Allaire and Geisinger have collaborated on the advancement of education and training for hospital-based physicians. The hospitalist program provides a tremendous value to Geisinger and Allaire in terms of patient coverage and general physician accessibility. Having hospitalists rotate to Allaire Grandview ensures that physicians are well versed in the care and management of patients who are cared for at a skilled nursing facility, while concurrently creating a system of open communication and care continuity.

Allaire and Geisinger continue to identify areas of opportunity for collaboration through a focus on overall population wellness and strategic consideration of increasing value for patients, physicians, and the broader market.
Southwest Vermont Health Care

Allaire acquired the Center for Living and Rehabilitation and the Center for Nursing and Rehabilitation from Southwestern Vermont Health Care. Southwestern Vermont Health Care is located in Bennington, Vermont. The Center for Living and Rehabilitation is located on the hospital campus, and the Center for Nursing and Rehabilitation is located a short distance away in Hoosick Falls, New York. The Southwestern Vermont Health Care Board of Directors and organizational executive leadership reached the conclusion that operating skilled nursing facilities was outside the core mission of the organization. In order to best serve the organization and patients, Southwestern Vermont Health Care sought a partner to take on the ownership and leadership of both skilled nursing facilities.

Based upon historical success and comparability of management philosophy, combined with a willingness to create a shared governance model, Allaire was selected to take over the facilities. Allaire and Southwestern Vermont Health Care created a model whereby Southwestern Vermont Health Care maintained a 20 percent interest in the operations of the facilities. Over the course of five years, Allaire has the opportunity to buy down the ownership position based upon performance and achievement. What is most positive about the model is the fact that both organizations have a vested interest in the advancement of performance – clinically and financially. As part of the structure, Southwestern Vermont Health Care has representation on the governance council for the two facilities, along with executive leaders and operations specialists from Allaire.

Allaire has implemented its own operations structure and management program within both facilities. Allaire is concurrently leveraging services available upon the Southwestern Vermont Medical Center campus – namely imaging and laboratory services. Allaire has also maintained relationships with physician leadership from Southwestern Vermont Health Care to ensure continuity of care between the respective facilities and to elevate clinical collaboration.
Atlantic Health – Morristown Medical Center

Allaire acquired its Morristown Post Acute facility, which is located directly across the street from Morristown Medical Center, with the sole intention of building a strong relationship with Atlantic Health. Proximity between the two buildings almost necessitates collaboration. With this in mind, Allaire began the process of forging relationships with Morristown Medical Center executives and Atlantic Health executive leadership. Discussions focused initially on key clinical programs where the two organizations could develop structured efforts to improve patient care and on creating a model of shared leadership that would involve Atlantic Health taking a modest interest in the facility.

Allaire and Morristown Medical Center executives identified the areas of cardiac and pulmonary care as immediate focus opportunities, based largely upon Morristown Medical Center’s strength in both areas and the opportunity to utilize the Morristown Post Acute facility as a means by which patients could be discharged from the hospital but still in proximity such that continuing care could be orchestrated by the Morristown Medical Center clinical team(s). Through discussions regarding each program, processes and protocols have been developed in support of both care disciplines, and clinical education and training is being provided bi-directionally.

Beyond collaborating on cardiac and pulmonary care, Morristown Medical Center made an impassioned request that Allaire consider implementing a COVID-19 unit for transitional patients. Allaire worked closely with the team from Morristown Medical Center to develop an appropriate clinical environment for patients recovering from COVID-19, utilizing isolation protocols and prevailing treatments (at the time). Staff were trained in the most current forms of infection prevention and donning and doffing protective gear. The unit remained operational through the entirety of the first wave of the pandemic and was resurrected for the second wave over the winter. Should a third implementation be necessary due to increased presence of Delta variant patients, Allaire and Morristown Medical Center will move accordingly and implement immediately.
Pennsylvania Department of Health

Based upon successful operations strategies and results orientation, the Pennsylvania Department of Health has engaged Allaire Health Services to provide interim operational management of several facilities that have been in need of additional, external management expertise in support of advancing patient care and managing staffing challenges. Department of Health officials meet weekly with Allaire’s management team to review operational strategies and develop action plans for the sake of advancing care at involved sites.

In particular, the Pennsylvania Department of Health engaged Allaire to provide immediate engagement in stabilizing the Brighton Nursing and Rehabilitation Center in Beaver, Pennsylvania. This extremely large facility suffered significant issues and concerns during the early stages of the COVID-19 pandemic and was sorely in need of external expertise and guidance on the implementation of patient cohorting strategies, staffing strategies, and overall infection prevention strategies.

Within several weeks of being onsite, Allaire was able to address primary concerns to avert any further unnecessary spread of the virus while concurrently altering staffing plans and implementing patient care documentation and management strategies that will better serve the organization. Over the course of several months, Allaire was able to stabilize the organization – clinically and operationally – and has remained engaged as a long-term support team at the request of the Pennsylvania Department of Health.

Allaire has been engaged by the Pennsylvania Department of Health to provide management services in other facilities in Pennsylvania based upon the collaborative relationship with Allaire and the results that Allaire’s management services team have been able to deliver when engaged.
Appendix B

Key References
Ms. O’Connor was highly involved through the entire RFP process for Allaire’s acquisition of what is now Allaire Rehab & Nursing in Freehold, New Jersey.

John Bonanni
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Morris County
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Mr. Bonanni was highly involved through the entire RFP process for Allaire’s acquisition of the Morris View facility. He remains a strong advocate for Allaire’s services, having witnessed the progress made at Morris View in a very short time, and includes Allaire’s leadership team in other county initiatives aimed at improving overall healthcare and wellness services.

Jennifer Carpinteri
Director
Morris County Department of Human Services
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Ms. Carpinteri was highly involved in the RFP process for Allaire’s acquisition of the Morris View facility. She remains an active partner with Allaire’s leadership team at Morris View.

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Phone: (908) 377-0410
Email: geoff.perselay@gmail.com

Mr. Perselay has been an integral participant in the RFP process for the acquisition of the Morris View facility as well as with other business in Monmouth County. Mr. Perselay remains engaged with Allaire through scheduled monthly business strategy meetings.
Christine Myers
Morris County Healthcare Advocate
Regional Member, U.S. Small Business Administration
Phone: (908) 451-7415
Email: Christine.Myers@sba.gov

A Freeholder, New Jersey resident, and local business advocate, Ms. Myers has become a strong advocate for Allaire’s involvement at Morris View and other facilities/programs in New Jersey. She meets regularly with the Allaire leadership team and has included members of Allaire’s leadership team in discussions related to state regulations for skilled nursing facilities as part of her role with President Trump’s administration.

Michelle Boone
Former Owner
Grandview Nursing and Rehabilitation Center
Danville, Pennsylvania
Phone: (570) 854-0619

Ms. Boone is a former owner of the Grandview Nursing and Rehabilitation Center and was part of the administrative team that Allaire worked with during the transition of the Grandview facility to Allaire’s ownership. Ms. Boone and her family owned and operated the Grandview facility for many years and were committed to selling to a new owner that would uphold the family values that they had leveraged in operating the facility and carry on their tradition of operating the business as a family effort.

Bradley Flansbaum, DO, MPH, MHM
Associate Director, Dept. of Hospital Medicine
Associated CMO, Population Health
Geisinger Medical Institute
Danville, Pennsylvania
Phone: (570) 271-5555, ext. 54199

Dr. Flansbaum is the Associate Director of Geisinger’s hospital medicine program and has worked closely with Allaire leaders and clinicians since Allaire took over operations of Grandview Nursing and Rehabilitation Center. Through direct engagement and collaboration, Dr. Flansbaum and Allaire have developed a strong program that reciprocally cares for patients and provides ongoing education to hospital medicine physicians, residents, and other clinicians involved in the care of patients and residents at the Grandview facility.
Appendix C

Organizational Chart – Allaire Health Services
Appendix D

Allaire Health Services
Executive Team Biographies
Benjamin Kurland is President, Chief Executive Officer, and owner of Allaire Health Services, a progressive healthcare services organization based in Central New Jersey. Under Ben’s leadership and with an intense focus on operational turnaround, Allaire has grown from owning and operating a single facility into being a complex, comprehensive multi-facility company that spans four states – New Jersey, Pennsylvania, Vermont, and New York. With diverse experience working with Hospitals, Health Systems, Managed Care Organizations, multi-specialty/multi-location physician group practices, and Management Service Organizations (MSO), Ben provides leadership and direction to over 750+ staff members and works to ensure that the facilities he is leading operate as a centerpiece of the community.

Ben began his career in healthcare volunteering in the oncology ward for Zichron Menachem, a cancer support organization, and has progressively advanced within the skilled nursing facility business. He has served as Assistant Administrator, Administrator, and Regional Administrator, eventually becoming a partner in three Aristacare buildings. With each position, Ben has maintained a vision of exceptional performance leveraging evidence-based clinical care strategies, always focused upon what is best for patients and residents.

Ben has successfully transformed a total of ten (10) underperforming facilities (three at Aristacare and six at Allaire) by implementing industry best practices and partnering with leading hospitals/health systems in the region to source patients/residents, align care strategies, and advance strategies for population health and wellness. The institutions that have been acquired or come under Allaire management now offer premium healthcare programs that outperform the competition in terms of team cohesiveness, operational efficiency, productivity, and patient outcomes. Driving the industry standard for program quality in Allaire’s first building, Ben led the transformation of a specialized but underutilized neurological program, which started with 18 beds, and transformed it into a full-service facility with 174 beds dedicated to long-term neurological impairment with programmatic technologies and a multidisciplinary approach to patient-centered services. With this success, Allaire has added additional facilities to the Allaire family, each of which have undergone the same level of clinical, performance, and aesthetic transformation as the original Allaire facility.

Ben continues to identify new opportunities for expanding the Allaire portfolio of facilities and services. The strategies employed within Allaire facilities have been recognized by other organizations as leading practices, and this recognition has resulted in launching Allaire Management Services. Under Ben’s leadership, Allaire Management Services was engaged by the State of Pennsylvania’s Department of Health to lead a turnaround and restructuring of a significant facility in Western Pennsylvania to overcome a mass COVID-19 outbreak within the resident population. Ben has concurrently led the development and advancement of a formal affiliation between Allaire Health Services and Atlantic Health, a partnership focused on joint operation and service delivery at Allaire’s Morristown Post Acute facility. The partnership has also resulted in the rapid establishment of a dedicated COVID-19 unit for transitional care. Under Ben’s leadership, Allaire has evolved from being an operator of facilities to being a comprehensive
management and advisory company for skilled nursing facilities.

In addition to responsibilities with Allaire, Ben serves as a Board member of the Healthcare Association of NJ (HCANJ). He was the recipient of the New Administrator Award in 2011 from the New Jersey College of Healthcare Administrators and currently serves as the non-profit organization’s Vice President. As a community-focused advocate, Ben is an active member of the Traumatic Brain Injury Alliance and participates in numerous community philanthropic events. Ben is also a regular guest speaker for New Jersey’s Professional Career Services organization.

Ben has a master’s degree and his LNHA certification. In addition, he is a Certified Dementia Practitioner. Ben also holds his RAC-CT, enabling him to understand MDS terminology and better provide care to residents.
Chava Goldschmidt
Chief Nursing Officer

Chava is a Certified Rehabilitation Registered Nurse with several years of experience in rehabilitation and long-term care nursing, clinical reimbursement, quality assurance, and healthcare management. After attending nursing school at the University of Pennsylvania, she began her career as an MDS Coordinator, gaining expertise in SNF reimbursement, CMI, QM management, and care planning. After piloting a quality improvement initiative that brought her facility’s QM rating from one to five stars, she realized her passion for quality assurance and healthcare leadership. She accepted the position of Director of Nursing, managing a staff of over 80 employees, and balancing administrative duties with clinical oversight – always with an eye toward outcomes.

A believer in education, one of Chava’s first steps as a DON was to establish an annual education program that provided hands-on, skills-oriented training for the clinically competent nurse, with topics ranging from EKG training and respiratory therapy, to behavior management in dementia, physical assessment, and communication with physicians. At the same time, she focused her efforts on managing hospital readmissions, wounds, falls, and infections. Using a combination of staff education, patient feedback, and physician/hospital engagement, her team successfully reduced the facility’s 30-day readmission rate from 24% to 14%; tapered facility acquired wounds from 9% to 1.5%; and significantly decreased unnecessary antibiotic usage. Chava also oversaw the facility’s transition from paper charting to EMR, with 100% practitioner engagement.

In 2016, Chava became trained as a Certified Life Care Planner. She developed experience as an expert witness, testifying about the long term medical and nursing needs of individuals suffering from catastrophic injuries. She also worked as a bedside nurse in a long-term care facility with specialized neuro and ventilator units. At the same time, Chava worked as a clinical reimbursement and quality assurance consultant for more than ten skilled nursing facilities.

As Chief Nursing Officer of Allaire Health Services, Chava oversees the nursing operations of Allaire’s seven skilled nursing facilities. Chava works with the Directors of Nursing to implement clinical programs and protocols, develop educational materials, write policies, oversee regulatory compliance and infection control, and ensure the consistent delivery of evidence-based, patient-centered care. She also oversees the clinical reimbursement processes in all Allaire facilities.

As an active member of AANAC (American Association of Nurse Assessment Coordinators), AANLCP (American Association of Life Care Planners), and ARN (Association of Rehab Nurses) Chava has the ability to network with other healthcare leaders and derive new policies, procedures, and ideas that continue to advance Allaire Health Services level of care.

Chava earned her Bachelor of Science in Nursing from the University of Pennsylvania in 2010. She maintains active RN licenses in both New Jersey and Pennsylvania. Other certifications include CNLCP (Certified Nurse Life Care Planner) and CRRN (Certified Rehabilitation Registered Nurse).
R. Kyle Kramer  
Chief Strategy Officer

Kyle Kramer is a nationally recognized healthcare leader who joined Allaire Health Services as a key advisor in 2018 after having spent 24 years in executive level service at major academic and community health systems. He brings a strong focus on physician/hospital alignment and strategic relationship development to Allaire and works with clientele nationally. He is widely acknowledged for his experience and expertise in major service line leadership and operations, clinical ancillary program strategy, performance management and improvement, billing and reimbursement services, and strategic partnership development between physicians, hospitals, and other industry participants. Kyle is one of the nation’s foremost experts in cardiovascular service line leadership and cardiovascular practice.

Throughout his career, Kyle has served as the executive lead on multiple projects related to Organizational Strategic Planning and Performance Improvement; Hospital Restructuring and Turnaround; Hospital Closure Planning; Cardiovascular Program Structure and System Alignment; Orthopedic Service Line Planning and Network Development; Facilities Strategy, Feasibility, and Design; Hospital and Ambulatory Surgery Development Strategy; Behavioral Health Physician Alignment; Physician Integration and Alignment; Clinically Integrated Network Development; Faculty Practice Plan Development; Physician Needs Assessment and Associated Compensation Planning; and Supply Chain Optimization and Savings. He has also provided interim leadership and leadership coaching for physicians and executives at a major health system. Kyle has also done considerable work in the development of strategies to leverage clinical, operational, and financial data to optimize program and organizational performance, along with enhancing physician/hospital partnerships. Kyle also provides guidance and support to Allaire’s leadership team on matters of compensation, physician practice and clinical program performance, and business valuation.

Prior to joining Allaire, Kyle served as an executive at Main Line Health in Philadelphia, Yale-New Haven Health System, Penn State University and Geisinger, and the University of Texas – Houston. Kyle has also served as President of the American College of Cardiovascular Administrators, Chairman of the American Academy of Medical Administrators, and as a Board Member for the American Heart Association. Kyle is also highly involved in youth leadership development through Boy Scouts of America. He has served as a troop leader for many years and is now Training Chair for all levels of leadership training – adult and youth – in Southeastern Pennsylvania.

Professional Designations:
- Fellow and Past President, American College of Cardiovascular Administrators
- Fellow and Past Chairman, American Academy of Medical Administrators

Education:
- BBA, specialization in Marketing, University of Texas, Austin, TX
- BBA, specialization in Finance, University of Texas, Austin, TX
Bill Mettler  
Chief Financial Officer

With over 25 years of finance and operations management experience, William Mettler has shown a proven team-leader attitude and adaptability in a range of situations. As Allaire Health Services’ Chief Financial Officer, Bill meticulously reviews costs and revenue streams with his team to ensure that all reporting to state and federal governments is accurate and operates within Medicare and Medicaid guidelines. With his development and implementation of key performance measures, Bill is able to improve the level of care residents receive by reducing unnecessary costs. Talented at forecasting long-term growth projections based off of current trends, Bill provides valuable insight within all aspects of the company such as new program implementation, quality mix, and building renovations.

Bill was recruited to join the executive team after his talents were revealed to CEO, Ben Kurland, during a meeting in Danville, Allaire’s Pennsylvania location. There he had also been serving as the CFO for a 172-bed skilled nursing facility. His background as a HIPAA officer and ability to manage a $17 million budget with ease and foresight made him the perfect candidate to bring into Allaire Health Services. Bill oversees all employee payroll, contract negotiations, and statistical reporting including risk management.

As a member of the Pennsylvania Coalition of Affiliated Healthcare and Living Communities, Bill stays knowledgeable of the ever-changing healthcare industry, allowing him to make financial decisions that result in positive company outcomes. He is also heavily involved with alternative needs individuals within the community as a committee member of the Central Susquehanna Sight Services, a public service organization within six counties that aides the visually impaired. Bill serves on #38 credit Union’s Investment and Planning committees.

Bill received his MBA from the Bloomsburg University of Pennsylvania in 1995 and his bachelors in accounting in 1989. He has used both degrees within his positions since graduation.
Chaim Brecher serves as Controller for Allaire Health Services. He actively administers an annual budget of $48M and allocates resources to maximize investments, profitability, business expansion, and revenue growth. Chaim consults with building administrators in addition to other members of the executive team to appropriately allocate funds departmentally across the Allaire buildings. With a meticulous eye for all combined with his knowledge of the healthcare landscape Chaim ensures the facilities are always in full compliance with the numerous local state and federal regulations that govern the industry.

Chaim entered the field of healthcare in 2015 as an administrative intern with New Grove Manor, obtaining his LNHA License in the process. He was quickly promoted to the Assistant Controller position. He showed his strength as a hands-on leader by organizing employee appreciation events that created a close-knit team with improved communication skills at the facility. By teaching onboarding orientation sessions, Chaim was better able to know his employees and ensure industry best practices. His duties included payroll, vendor relationship management AP/AR as well as HR compliance, and most importantly quality assurance. Chaim oversaw all resident business services from maintaining cash for personal needs funds to assessing and expediting resident concerns to the proper solution avenues.

The community is greatly improved by Chaim’s efforts as well by serving as a teacher and mentor to numerous troubled children over the years. Additionally, Chaim has help to found an organization that raises necessary funds to help new mothers from underprivileged families. Chaim also utilizes his business skills to assist in the day to day operations of the local congregations he is affiliated with.

Chaim became a licensed administrator in the state of New Jersey in 2015. He holds his master’s degree from Beth Medrash Go voah and has since continued his education with additional business courses.
Ahron Lieberman  
Director of Operations

Ahron Lieberman is central to the management of operations across all of Allaire Health Services’ facilities. In his role as Director of Operations, Ahron leads the development and implementation of strategic and operational workforce plans, leadership development, and human resource integration across all our facilities. He provides strategic direction in all areas of human resources operations, including HR technology, employee benefits, compensation, and talent acquisition and development.

In his search to acquire the best employees for Allaire’s facilities, he has successfully launched social media campaigns, designed referral bonus systems, and maintains a strong presence at all local schools and workforce development venues where he presents and advises those searching for career opportunities within the healthcare Industry.

Ahron also coordinates the training agenda for Allaire University, Allaire’s internal employee development program. Ahron is responsible for the development and maintenance of training curriculums within each area of Allaire’s workforce – clinical and administrative. Working with facility administrators, Ahron identifies employees with interests in personal growth and professional advancement and develops personalized training programs beyond what is typically offered to team members.

In addition to his accomplishments in Human resources, Ahron also is a certified dementia practitioner and a certified administrator in New Jersey and Pennsylvania.
Appendix E
Allaire Health Services
Clinical Program Strategies
At Allaire University, staff nurses gain from a hands-on, skills-based approach to learning clinical concepts. Allaire’s team of educators for this program is comprised of employed staff and outside clinicians, with specialties including respiratory therapy, wound care, infectious disease, emergency medicine, and cardiology.

Educational topics have included:

- Head to Toe Assessment Skills Workshop
- Respiratory Therapy Skills Workshop
- EKG Skills Workshop
- Communication with Physicians: Role Playing Scenarios
- Wound Prevention and Healing
- Antibiotic Stewardship: Reducing Unnecessary Antibiotic Use
- Managing Difficult Behaviors in Dementia
- Advanced Care Planning
- Fall Prevention: We Want YOU to Help Prevent Falls
- Early Sepsis Detection
- Advanced Cardiac Workshop
- Customer Service: Compassion Meets Competence
- The Other Side: An ER Doc’s Perspective on How to Improve SNF / Hospital Communication to Avoid Admissions
CONGESTIVE HEART FAILURE PROTOCOLS FOR REFERRAL

PREMISE
Allaire Rehab and Nursing Center is equipped to care for residents with a variety of clinically complex conditions.

Hospitals admit cardiac patients who require advance clinical and surgical interventions. Care extending beyond the hospital is crucial for successful patient outcomes.

SERVICES OFFERED IN RELATION TO OUR CONGESTIVE HEART FAILURE PROGRAM:

- Skilled Nursing/Sub-Acute
- Sub-Acute rehabilitation up to 7 days a week
- Dietary observation and counseling
- IV Support
- Patient/Family education and support (including psychosocial support)
- Alternative leisure activities
- Oxygen monitoring support
- Discharge Planning including follow up beyond home health care

ADMISSION REFERRAL PROCESS

To Sub-Acute:
The process starts with the facility’s case manager
1. Allaire’s external case manager reviews referrals in the hospital for facility admission to the Sub-acute unit. Referrals from the hospital are taken directly.
2. Case Management and our facility are available 7 days a week for expedited case reviews.
3. Simple cases may be reviewed via phone for expedited admissions.

PHYSICIAN SUPPORT:
1. Once admitted to Allaire, the patient is followed by a cardiologist.
CHF PLAN OF CARE

- Admission orders including:
  - Diet/Fluid restriction
  - Exercise and activity level
  - Rehabilitation orders
  - Weigh monitoring
  - Medications
  - Laboratory work

- Nursing component:
  - Observation and physical exam
  - Vital signs and weight
  - Medication management
  - IV medications
  - Patient and family education

- Consultant pharmacist:
  - Medication review
  - Staff education (pharmacology)
  - Patient and family education

- Dietician
  - Provide appropriate diet
  - Patient and family education and discharge information

- Rehabilitation staff
  - PT and OT as appropriate with blood pressure (BP) and pulse (P) monitoring
  - Restorative care for conditioning
  - Patient and family education: adjustment to home and energy conservation techniques.
### CHF PATHWAY ORDER

<table>
<thead>
<tr>
<th>CHF PATHWAY ORDER</th>
<th>CHRONIC CHF PATHWAY</th>
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<tbody>
<tr>
<td><strong>Patient Name:</strong></td>
<td><strong>Physician Name:</strong></td>
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#### ACUTE CHF PATHWAY

- **Admit per Protocol:**
- **ALLERGIES:**
- **ORDER FOR CARDIOLOGY CONSULT WITH CHANGE OF HEART CARDIOLOGY**
- **CODE STATUS:**
- **VITAL SIGNS:** Every 8 hours x 14 days then BP and Pulse

<table>
<thead>
<tr>
<th>DAILY WEIGHTS AND INTAKE AND OUTPUT X14 DAYS THEN WEEKLY. NOTIFY MD IF WT GAIN GREATER THAN 2LBS IN 24HRS/5LBS IN 1 WEEK</th>
<th>DAILY WEIGHTS AND INTAKE AND OUTPUT X14 DAYS THEN WEEKLY. NOTIFY MD IF WT GAIN GREATER THAN 2LBS IN 24HRS/5LBS IN 1 WEEK</th>
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<tr>
<td><strong>DIET:</strong> _____________ 2Gram NA</td>
<td><strong>DIET:</strong> _____________ 2Gram NA</td>
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<td><strong>OTHER</strong> ______________</td>
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- **Oxygen Management:**
  - O2 at 2 L via nasal cannula or mask PRN
  - O2 Saturation every 8 hours and prn x 14 days then daily
  - Assess lung sounds every 8 hours x 14 days then daily

- **BMP baseline & then weekly**
- **CXR for Shortness of Breath or Cough**
- **CBC baseline & then weekly**
- **BNP baseline & then weekly**

- **CHF teaching by nurse if applicable (see attached patient education)**

#### CHF teaching by nurse if applicable (see attached patient education)

- **Reminder:** NSAIDS, Actos (Pioglitazone), and Avandia (Rosiglitazone) potentiate fluid retention and may lead to exacerbation of CHF. Metformin given in patients with renal insufficiency may cause lactic acidosis.

#### CHRONIC CHF PATHWAY

- **Admit per Protocol:**
- **ALLERGIES:**
- **ORDER FOR CARDIOLOGY CONSULT WITH CHANGE OF HEART CARDIOLOGY**
- **CODE STATUS:**
- **VITAL SIGNS:** Blood pressure and pulse weekly

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<tr>
<th>DAILY WEIGHTS AND INTAKE AND OUTPUT X14 DAYS THEN WEEKLY. NOTIFY MD IF WT GAIN GREATER THAN 2LBS IN 24HRS/5LBS IN 1 WEEK</th>
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- **Oxygen Management:**
  - O2 @2L/min via nasal cannula prn for shortness of breath
  - Weekly O2 Saturation
  - Assess lung sounds daily

- **BMP every 3 months**
- **Digoxin level every 3 months (if on Digoxin)**
- **CRX for shortness of breath or cough PRN**
- **CBC every 6 months**
- **Hemoglobin A1C baseline & then weekly (if diabetic)**
- **Lipid Panel**

- **CHF teaching by nurse if applicable (see attached patient education)**

#### CHF teaching by nurse if applicable (see attached patient education)

- **Reminder:** NSAIDS, Actos (Pioglitazone), and Avandia (Rosiglitazone) potentiate fluid retention and may lead to exacerbation of CHF. Metformin given in patients with renal insufficiency may cause lactic acidosis.
<table>
<thead>
<tr>
<th>DATE</th>
<th>TIME</th>
<th>TEMPERATURE</th>
<th>PULSE</th>
<th>RESPIRATIONS</th>
<th>BLOOD PRESSURE</th>
<th>PULSE OX</th>
<th>WEIGHT</th>
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<thead>
<tr>
<th>GREEN ZONE = “All Clear”</th>
<th>GREEN ZONE MEANS:</th>
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<tbody>
<tr>
<td>I do not have a change in my cough.</td>
<td></td>
</tr>
<tr>
<td>My sputum has not changed.</td>
<td></td>
</tr>
<tr>
<td>There is no change in my level of shortness of breath during the day or night.</td>
<td></td>
</tr>
<tr>
<td>I am able to maintain my normal activity level.</td>
<td></td>
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<tr>
<td>There has been no change in the number of pillows I use to sleep.</td>
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</table>

<table>
<thead>
<tr>
<th>YELLOW ZONE = “CAUTION”</th>
<th>YELLOW ZONE MEANS:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ask yourself the following questions each day:</td>
<td></td>
</tr>
<tr>
<td>Do I have a new or increased cough?</td>
<td></td>
</tr>
<tr>
<td>Has the amount or color of my sputum changed?</td>
<td></td>
</tr>
<tr>
<td>Have I experienced an increase in shortness of breath at rest, with activity or when sleeping?</td>
<td></td>
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<tr>
<td>Have I been more tired than usual?</td>
<td></td>
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<tr>
<td>Have I needed to increase the number of pillows needed to sleep or do I need to sleep in a chair?</td>
<td></td>
</tr>
<tr>
<td>If you answered YES to any of the YELLOW ZONE questions call your doctor.</td>
<td></td>
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<thead>
<tr>
<th>RED ZONE = “MEDICAL ALERT”</th>
<th>RED ZONE MEANS:</th>
</tr>
</thead>
<tbody>
<tr>
<td>You need to be evaluated by a doctor right away.</td>
<td></td>
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</table>

Primary Doctor: __________________________  
Phone Number: __________________________
<table>
<thead>
<tr>
<th>GOALS:</th>
<th>APPROACHES:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pneumonia</td>
<td>Administer if NOT received</td>
</tr>
<tr>
<td>To improve airway patency</td>
<td>Provide inhaled medication as ordered</td>
</tr>
<tr>
<td></td>
<td>Encourage hydration</td>
</tr>
<tr>
<td></td>
<td>Deep breathing &amp; cough</td>
</tr>
<tr>
<td></td>
<td>Incentive Spirometry</td>
</tr>
<tr>
<td></td>
<td>Administer &amp; titrates or as prescribed</td>
</tr>
<tr>
<td>Maintenance of proper fluid volume</td>
<td>Encourage hydration</td>
</tr>
<tr>
<td>Maintenance of adequate nutrition</td>
<td>Encourage diet as ordered</td>
</tr>
<tr>
<td>Understanding of treatment and prevention measures</td>
<td>Use of inhaled medication use</td>
</tr>
<tr>
<td></td>
<td>Provide pneumonia/COPD patient education material</td>
</tr>
<tr>
<td></td>
<td>Provide smoking cessation education material (if wanted)</td>
</tr>
<tr>
<td>Absence of complication</td>
<td>Monitor vital signs</td>
</tr>
<tr>
<td></td>
<td>Notify Physician</td>
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<tr>
<td></td>
<td>- SPO2 &lt;92%</td>
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<td></td>
<td>- RR &gt; 25 BPM</td>
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<tr>
<td></td>
<td>- HR &gt; 20 above baseline</td>
</tr>
<tr>
<td></td>
<td>- Temp &gt; 38.3</td>
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<tr>
<td>Prepare for discharge</td>
<td>Titrate oxygen to ordered SPO2</td>
</tr>
<tr>
<td></td>
<td>Home O2 assessment</td>
</tr>
<tr>
<td></td>
<td>Equipment &amp; supports arrange</td>
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<tr>
<td></td>
<td>Home care if necessary</td>
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<tr>
<td></td>
<td>Provide physician follow-up information</td>
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<td></td>
<td>Inhale instructions</td>
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# Neurosciences

## 2019 Horizons at Allaire Program Guide

The only special care nursing facility in the state of New Jersey to offer long-term care under Medicaid for young adults ages 18 to 59 years old with a qualified neurological impairment.

Victoria Smith is Horizons at Allaire’s own program director works diligently with her team to specially design each individual’s comprehensive treatment plan.

Victoria and her team follow the most updated neurological standards of treatments, therapies, and programs to bring individuals to their highest level of rehabilitation.

Our devoted nursing staff is specifically trained in the complex conditions associated with traumatic brain injury and other neurological impairments; all of whom provide the highest level of nursing care with the utmost compassion.

<table>
<thead>
<tr>
<th>Therapeutic Recreation:</th>
<th></th>
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<tbody>
<tr>
<td>· Activities specialized to young adult population</td>
<td>· Tai Chi</td>
</tr>
<tr>
<td>· Assistive Technology Computer &amp; Communications Center with dedicated IT professional</td>
<td>· Movie Night</td>
</tr>
<tr>
<td>· Cognitive Behavioral Therapy (CBT) Support Groups</td>
<td>· Hair Dresser</td>
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<tr>
<td>· Creative Art Therapy</td>
<td>· Virtual Reality</td>
</tr>
<tr>
<td>· Music Therapy</td>
<td>· Cooking Classes</td>
</tr>
<tr>
<td>· Pet Therapy</td>
<td>· Community Bus Trips</td>
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<td></td>
<td>· Sensory Room</td>
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<tr>
<td></td>
<td>· Road to Recovery Support Group</td>
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<tr>
<td></td>
<td>· Reiki Therapy and Singing Bowls</td>
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<thead>
<tr>
<th>Comprehensive Rehabilitation:</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>· Physical Therapy</td>
<td>· Neurologist</td>
</tr>
<tr>
<td>· Occupational Therapy</td>
<td>· Neuro-Psychologist</td>
</tr>
<tr>
<td>· Speech Pathologist</td>
<td>· Psychiatrist</td>
</tr>
<tr>
<td>· Cognitive Rehabilitation</td>
<td>· Neuro Patient Care Technicians (NPCT)</td>
</tr>
<tr>
<td>· Physiatrist</td>
<td>· Dietitian for individualized meal plans</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Community Connections:</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>· MOCEANS peer to peer self-help group</td>
<td>· N.J Brain Injury Alliance</td>
</tr>
<tr>
<td>· SFUR Program (equine therapy)</td>
<td>· National MS Society</td>
</tr>
<tr>
<td>· Community Support Groups</td>
<td>· Division of Developmental Disabilities</td>
</tr>
<tr>
<td>· Brookdale GED program</td>
<td>· N.J Family Resource Center</td>
</tr>
<tr>
<td>· MS Association of America</td>
<td>· BINA Stroke &amp; Brain Injury Alliance</td>
</tr>
<tr>
<td></td>
<td>· Caregivers of New Jersey</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Additional Services:</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>· Individualized neuro care plan</td>
<td>· Resident and family self-advocacy meetings</td>
</tr>
<tr>
<td>· High staffing levels</td>
<td>· Initial, quarterly, and annual meetings involving all disciplines, resident, and family</td>
</tr>
<tr>
<td>· 1:1 support as needed</td>
<td></td>
</tr>
</tbody>
</table>

*Image of horizons at allaire logo at the top of the page.*
Appendix F
Allaire Health Services
Insurance Certificate
November 29, 2020

RE: Allaire Healthcare Group Liability Coverage

To whom it may concern:

Per request, below is a summary of the insurance coverages provided to Allaire Healthcare Group and its related facilities:

**Healthcare Professional and General Liability** - we provide $1,000,000 Per Occurrence / $3,000,000 Aggregate Limits. Typically this coverage is on a claims-made form, however, we do have some facilities on an occurrence form.

**Property** – we provide full replacement cost coverage on a blanket basis for buildings and business personal property. In addition we provide Business Interruption coverage for annual revenue protection.

**Commercial Automobile Liability** - we provide $1,000,000 combined single limits for the automobile liability.

**Employment Practices and Directors and Officers Liability Coverages** – we provide $1mil limits for both the EPL and D&O coverages. Premier is named as additional insured on all facility policies.

**Crime/Employee Dishonesty** - We provide a primary crime limit of $100,000 and offer excess crime limits as required by lending institutions.

Sincerely,

Barry Perlstein
President