

A CULTURE OF  
**MANAGEMENT**

 **TRADITIONS**  
MANAGEMENT



Every family has their traditions . . . Traditions can be a part of yours.



## MISSION

Traditions communities will maximize the quality of life for each and every resident by providing the highest level of care and service.

Traditions, like many communities, has beautiful buildings with ample amenities. But our daily interactions with residents, the small acts of kindness and care, are the foundation of rich relationships and full lives.

## CULTURE

An organization's culture is shaped by the attitude and behavior of its employees. Traditions is committed to hire and retain people who believe in and practice our core values.

- Get to know residents and their loved ones on a personal level.
- Care about the needs of others and genuinely try to meet those needs.
- Truly like people and interacting positively with them.

## HISTORY

Traditions Management was formed in 2012 with the sole purpose of providing superior care and lifestyle options in Senior Living for families in the Midwest region.

Our core values have been our guiding principles each day in providing that superior care. Since the company's inception, and as we continue to grow, we look forward to our residents, family members, friends, and our team members experiencing firsthand a culture of genuine loving care that comes naturally.



**SOCIALIZATION**  
Purposeful interaction with family, staff and other residents promotes friendships and activities that maximize quality of life.



**DIGNITY**  
Service with **dignity** shall permeate all interactions we have with residents, families, fellow staff and visitors.



**CHOICES**  
Residents must have the ability to make **choices** regarding their daily life to maximize a sense of self-worth.



**CORE VALUES**  
Resident quality of life is maximized when we consistently embrace these VALUES:  
  
WHEN WE PRACTICE OUR CORE VALUES, A CULTURE OF GENUINE LOVING CARE COMES NATURALLY.



**IMPORTANT VS. NECESSARY**  
We all have **necessary** duties in our daily jobs, but we cannot let them crowd out the opportunity for **important** interaction with residents and families.



**SERVICE**  
Residents in our communities deserve the highest level of customer **service**.

## CORE VALUES

### ***Core Values: a culture of genuine loving care***

We believe resident quality of life is maximized when we promote the following values:

#### ***Dignity***

Service with dignity shall permeate all interactions we have with residents, families, fellow staff and visitors. It includes how we address each person and how we respond to their requests and needs. We will honor the value of each individual life by displaying respect and dignity throughout our communities.

#### ***Important vs. Necessary***

It is important that we understand the emotional and spiritual needs of our residents and families, their likes/dislikes and what makes them happy. Each person has a basic need for compassion and understanding. Our staff is trained to be watchful of opportunities to listen carefully when residents begin to communicate.

While necessary duties are a large part of our jobs, we cannot let them crowd out the opportunity for this important interaction.

#### ***Socialization***

Socialization empowers and encourages residents who may be suffering from losses and depression to regain their zest for life.

Studies show that residents who interact socially focus less on health issues than residents who remain secluded.

Purposeful interaction with family, staff and other residents promotes friendships and activities that are positive for both mental and physical health.

#### ***Choices***

We encourage and empower residents to make their own choices whenever possible.

Research indicates that residents need the ability to make choices and that this provides an ongoing sense of self-worth. We offer residents as many choices as possible early in their day, encouraging them to stay mentally involved and communicative as their day progresses.

#### ***Service***

We are in the business of serving others. The residents in our communities expect and deserve the type of service delivered in 5-star restaurants and resorts. This kind of service comes from getting to know the people you serve and anticipating, then exceeding their needs and expectations.

***It is an honor to serve the residents entrusted to our care with kindness and professionalism.***

***Every family has their traditions - Traditions can be a part of yours.***

## OUR LEADERSHIP



THOMAS C. SMITH  
CEO Leo Brown Group/Principal,  
Traditions Management



STACEY BORTZ, LPN, CDP  
Regional Vice President of  
Operations (KY, OH)



MICHAEL R. WAGNER  
President, Leo Brown Group/  
Principal, Traditions Management



JENNIFER GELLINGER  
Regional Vice President of  
Operations (IN, KY)



ANDY WADE, LNHA  
COO and Principal,  
Traditions Management



ROSE SIDDLER, LPN, CEAL, CDP  
Regional Vice President of  
Operations (KY, OH, PA)



KRISTIN CHERRY  
Vice President of Sales  
and Marketing



FRED DEBIASIO  
Executive Chef



ERIC DEXTER  
Vice President of Facilities



# A CULTURE OF SERVICE

## FROM OUR FAMILIES



**"Thank you for putting our safety first! As a resident, I, like others, miss our friends and family, but we value our health foremost and do not want to contribute to the problem. We appreciate that the mask and gloves rule is being enforced here for everyone, including management, staff, and construction workers. We love Ashton Grove!"** - Bev P. (AG)

**"Mum loves it there. The staff, nurses kitchen workers, residents are all amazing. It's where our loved ones should enjoy their golden years with eyes on them 24/7. Activities like you wouldn't believe, a beautiful movie theater with luxury seating, a dining room that's better than most restaurants... well you get the picture I'm sure. Mum needs socializing. She isn't a loner and loves people and everyone loves her. So blessed she's a resident there and love it."**  
- Carol J (AB)

**"You all are doing an awesome job taking care of our loved ones during this trying time. We want to make sure you know how much each and everyone of you are appreciated."** - Carol O. (HS)

**"Traditions at Reagan Park is a very inviting community. From the dietary staff up to the executive director, I have been met with an openness that I can see resonates with the residents. Whether during community events or any other time I've stopped in, it has been easy to see the family atmosphere that makes this home. When needed, their healthcare partners work seamlessly to coordinate care and help residents age in place and stay in their new home."**  
- Anonymous (Senior Advisor.com)

**"We live here and we know how special our staff is. They do so much more for us than you know. The smiles from the young that delivers food to our doors daily, activities staff checking on us daily with special treats, making sure we get out of our rooms to walk. If only you knew how much they really do. Thank God for them!"** - Mary Lou Mathus Weis (BM)



# A CULTURE OF CARING



## TRADITIONS MANAGEMENT

Our communities have a quiet, resort-like feel, even while conveniently located within walking distance of restaurants, coffee shops, pharmacies and area hospitals, but transportation is also provided.

You'll find well-appointed Independent Living options as well as thoughtful, expert Assisted Living and Memory Care, designed to encourage independence, dignity and well-being.

A beautiful building is important, and Traditions communities have all the modern amenities and comfort you would expect. ***But it's what happens inside these walls that makes each community special.***



The Varietas® Memory Care Program relies on the things we learn about your loved one to comfort and connect with them in a warm and nurturing environment. We are trained in the award-winning Behavior-based Ergonomics Therapy (BBET), a personalized, non-pharmacological therapy for seniors with Alzheimer's and dementia, designed to engage seniors, reduce their stress, depression, falls and medication use. Our licensed nursing staff is available to residents around the clock, 24 hours a day, 7 days a week, to monitor healthcare needs and supervise personal care.

Wellness Directors not only create Personal Service Plans for each resident when he or she joins the community, their teams routinely reassesses residents for emergent needs. Everyone makes it their job to understand what makes a resident happy.

We believe in the power of good nutrition, fellowship and freshly prepared, home-cooked meals, so we employ an Executive Chef to plan our menus, train our staff and create a delicious restaurant-style dining experience. We ask for our residents' suggestions and recipes to incorporate comfort foods and personal favorites and we serve breakfast throughout the day.

***Above all, we make room for the important things over the routines of the day.*** Sitting together and listening to a story, holding a hand, learning something new about a resident's life and remembering we are in the presence of people who have shaped our world. These moments don't show up in our job descriptions, but they make up the most meaningful parts of our day. We know how important they are.

KEY COMPONENTS OF THE VARIETAS® PROGRAM:

- Reduces agitation
- Enhances Socialization
- Reduces isolation, depression and loneliness
- Includes **therapeutic recreation** and **positive stimulation**
- Helps residents maintain or regain some life abilities



**BBET PROGRAM**

**BEHAVIOR BASED ERGONOMIC THERAPIES**

- Individualized care
- Reduces difficult behaviors resulting from agitation
- Improves sleep
- Improve appetite
- Reduce need for medication use
- Reduce falls
- Promote engagement in activities
- Enhance resident, family and staff interaction

**FAMILY SUPPORT GROUPS**

**MONTHLY FAMILY SUPPORT MEETINGS PROVIDE**

- Shared experiences from other caregivers and family members
- Validation and coping support
- Reduced distress, depression or anxiety
- A better understanding of what to expect through the disease process
- Information on treatment options
- Information that improves our caregiving

THE VARIETAS® PROGRAM IS BASED ON 4 PRINCIPLES

**1 THERAPEUTIC ENVIRONMENT**  
The Varietas® environment has been tailored to reduce stress on residents.

**2 INDIVIDUALIZED CARE**  
We recognize that everyone has a unique life story. We take special care to learn as much as we can about each resident and get to know them as a person.

**VARIETAS® MEMORY CARE**

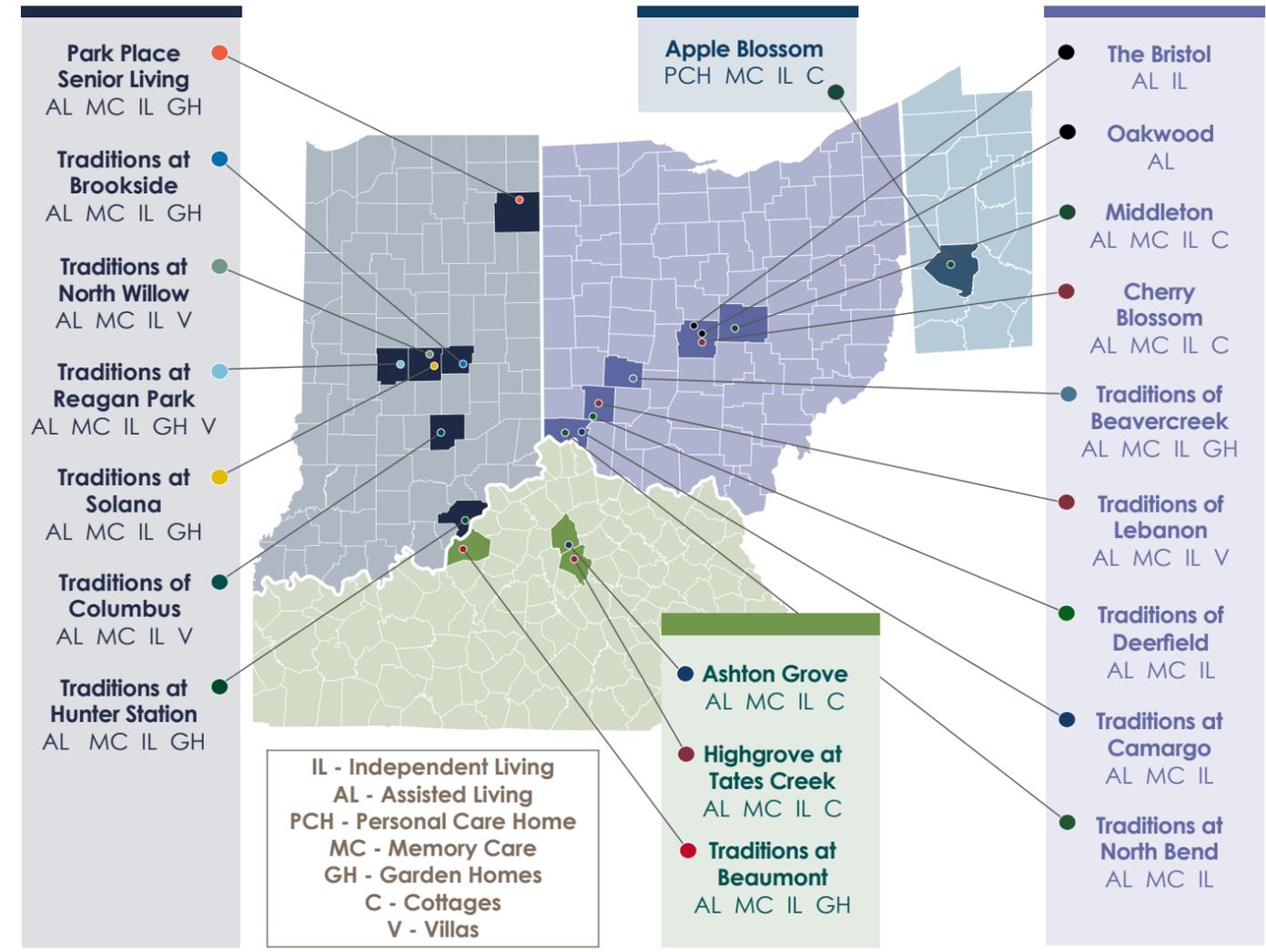
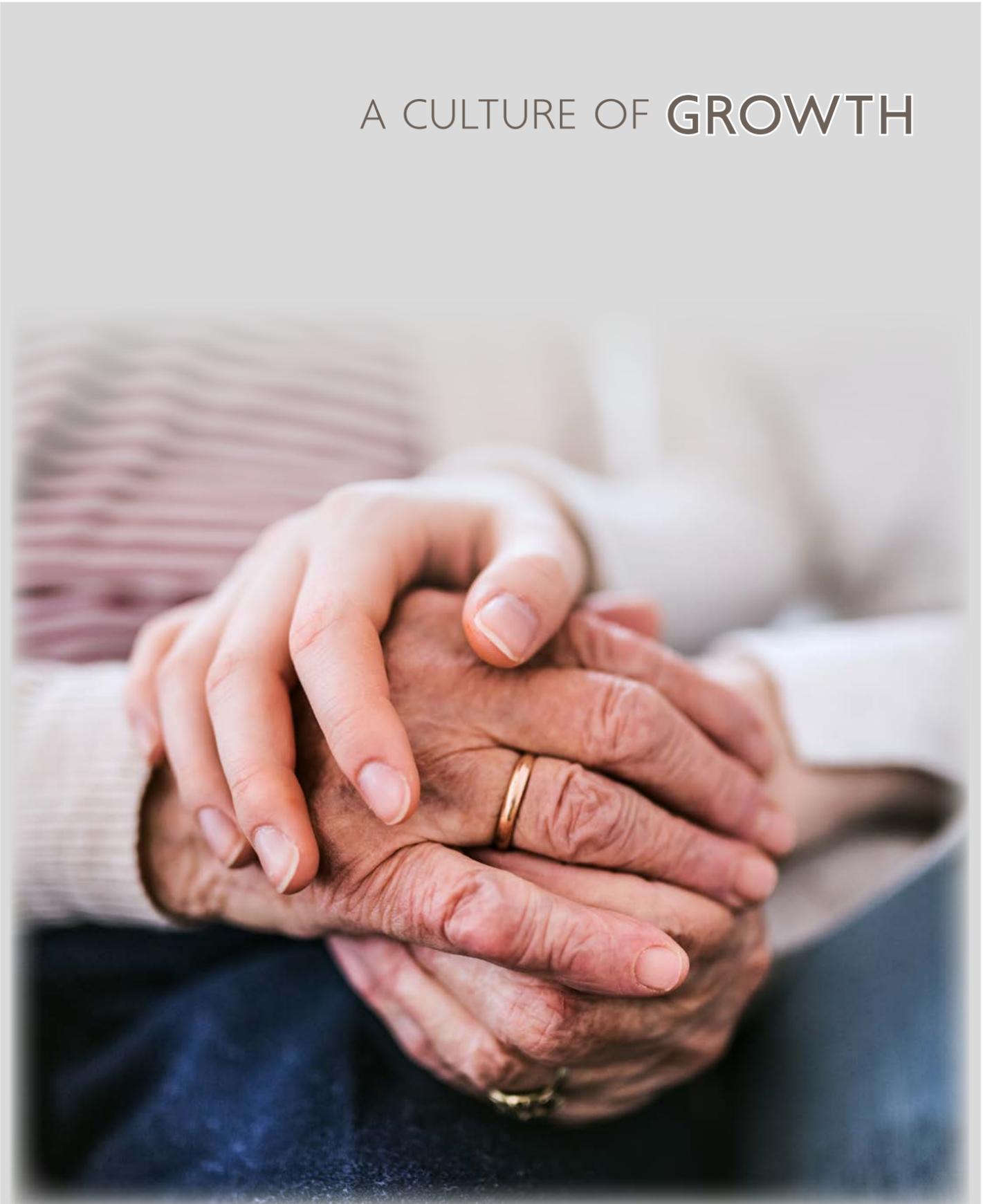
THE VARIETAS® PROGRAM is a model of caring for individuals with Alzheimer's Disease and related dementias.

THE PROGRAM'S MISSION is to maintain independence and improve quality of life through individualized care, empowerment, movement and compassion.

**3 SOCIAL ENGAGEMENT**  
The Varietas® **daily routine** provides therapeutic recreation that is designed to enhance social engagement.

**4 FAMILY SUPPORT**  
Part of the Varietas® mission is supporting our residents' families and loved ones, as well as those individuals caring for a loved one with dementia in their home.

# A CULTURE OF GROWTH



OUR COMMUNITIES



Traditions of Beaver Creek  
Beaver Creek, OH



Traditions at Camargo  
Madeira, OH



Traditions of Deerfield  
Loveland, OH



Traditions at Beaumont  
Louisville, KY



Traditions at Brookside  
McCordsville, IN



Coming in 2021 – Traditions of Columbus  
Columbus, IN



Coming in 2021 – Traditions of Lebanon  
Lebanon, OH



Traditions at North Willow  
Indianapolis, IN



Traditions at Reagan Park  
Avon, IN



Traditions at Hunter Station  
Sellersburg, IN



Traditions at North Bend  
Cincinnati, OH



Park Place Senior Living  
Fort Wayne, IN



Traditions at Solana  
Indianapolis, IN



OUR  
COMMUNITIES



Apple Blossom  
Moon Township, PA



Highgrove at Tates Creek  
Lexington, KY



Fall of 2020 – Oakwood  
Columbus, OH



Ashtongrove  
Georgetown, KY



Cherry Blossom  
Columbus, OH



Middleton  
Granville, OH



Fall of 2020 – The Bristol  
Columbus, OH

CASE STUDY IN MANAGEMENT

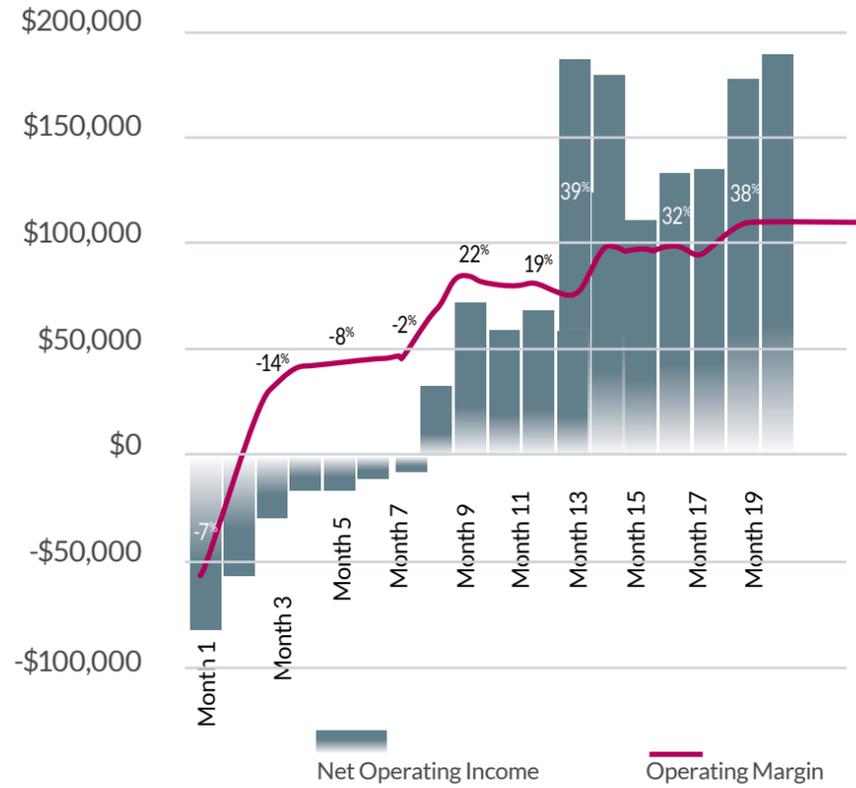


TRADITIONS  
OF BEAVERCREEK

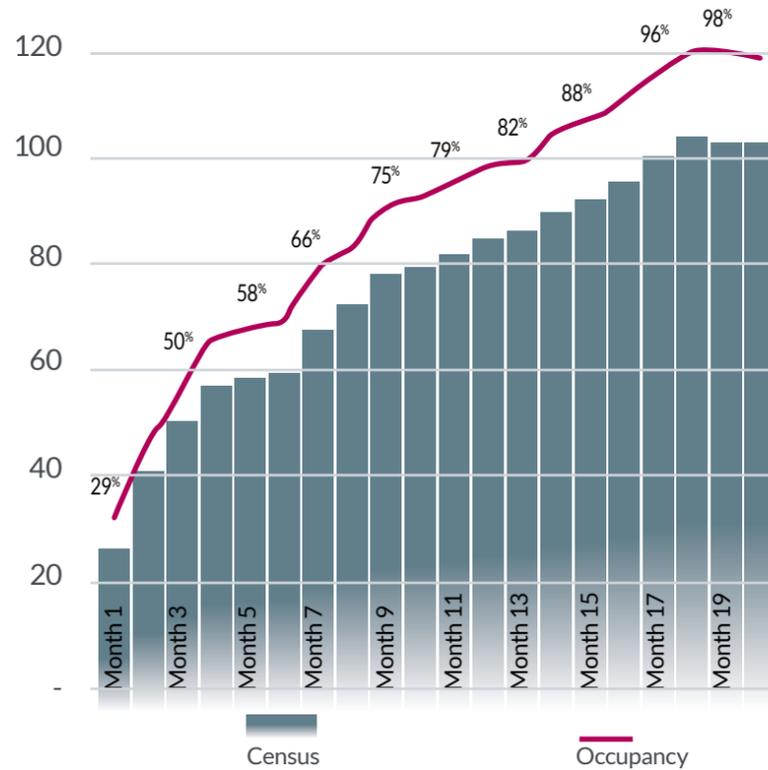


**Case Study:** Traditions Management was engaged by a developer to manage a 104-unit senior housing ground-up development in the Dayton, Ohio MSA. Due to Traditions' success in pre-leasing, the building was 50% occupied by the third month after opening in April 2017. Traditions also surpassed 90% occupancy by Month 16 of operations, which exceeded the proforma expectations by over a year. By maintaining a strong census and operating margins approaching 40%, the developer was able to sell the community in November 2018. Traditions continues to manage the community to this day.

FILL-UP SUCCESS:  
MONTHLY NET  
INCOME &  
MARGIN



FILL-UP SUCCESS:  
OCCUPANCY  
& CENSUS





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