

Freedom Residence Suites Business Plan

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Executive Summary

Freedom Residence Suites is dedicated to revolutionizing care and support for residents of various age groups, including young adults, those with work-life disabilities and seniors with diverse disabilities. The innovative approach centers on creating a home-like environment that fosters personalized and meaningful care in a barrier-free environment. This plan outlines a comprehensive strategy, and key features aimed at providing holistic non-clinical support services at a property projected to be located in Orange County, NY. The concept can be used to partner with for-profit, non-profit, or benefit programs, as well as entities that add value to a self-care model for both clinical and non-clinical services, ensuring a seamless integration of community support and quality care.

This conceptual Business Plan was developed for a potential project on 5 total acres consisting of two (2) apartment buildings. Each three (3) floors, 1st floor commercial, upper 2 floors each consisting of a residence with 8 suites.

This plan serves as a conceptual overview for potential partners, community organizations, and stakeholders who are passionate about advancing inclusive residential care solutions. It is designed to inform and inspire collaborative efforts that will help realize the vision of an inclusive, supportive living community.

Vision:

The vision is to create a supportive, inclusive, and community-oriented environment that is barrier-free, where individuals with disabilities—alongside their spouses, parents, children, or caregivers—can lead fulfilling and independent lives. The concept envisions a space where people of all abilities and backgrounds come together in a cohesive community that values diversity, fosters mutual respect, and encourages personal growth. This environment will not only meet the physical and emotional needs of residents but also empower them to pursue their aspirations, connect meaningfully with others, and thrive in a setting designed to accommodate and celebrate their unique strengths and experiences.

Mission:

The mission of Freedom Residence Suites is to enhance the quality of life and promote the independence of individuals with disabilities, regardless of the type or age of onset. The concept creates a comprehensive model of care that integrates non-clinical support with access to top-tier clinical services through strategic partnerships. The goal is to address the diverse and evolving needs of residents and their families by coordinating personalized care plans, fostering an inclusive community, and ensuring that each person receives the appropriate level of support to live a dignified and enriched life. By building a bridge between innovative care practices and a nurturing community, a new standard is set in residential care for individuals with disabilities.

Concept Overview

Blended Service Model: The Blended Service Model at Freedom Residence Suites provides care to individuals with diverse needs by integrating various levels of care into one cohesive system. While the residence provides non-care services and supports that exist in many condo, coop or club models, the barrier-free design facilitates a shared care service model for those with more advanced needs through existing programs and developing care models. The concept offers a coordinated approach that accommodates varying degrees of need, ensuring that each resident receives the

appropriate level of support. By combining non-clinical and clinical services in a seamless manner, a continuum of care is created that addresses the holistic needs of residents, enhancing their quality of life and promoting independence.

Alignment with Vision and Mission:

1. **Barrier-Free Residences:** Private suites of approximately 750' consisting of bedroom, sitting-area, hazard-free kitchen and fully accessible bath in a shared small home residence consisting of four (4) one (1) bedroom and four (4) two (2) bedroom suites surrounding a common area with kitchen, dining room, library, recreation/lounge areas and direct access to exterior areas.
2. **Comprehensive Care Approach:**
 - The **Blended Service Model** directly aligns with the mission of creating a model of care that integrates both non-clinical support and clinical care services. This approach ensures that the diverse needs of residents are met, whether they require basic assistance with daily activities, instrumental activities of daily living, or more intensive medical care.
3. **Flexibility to Address Diverse Needs:**
 - The vision emphasizes creating a supportive, inclusive, and community-oriented environment for individuals with disabilities and their families. The **Blended Service Model** is well-suited to achieve this by offering coordinated care that adapts to each resident's unique situation. This flexibility is key to addressing the varied needs across different age groups and levels of dependency. Non-care supports include monitoring, prompting and oversight in a supportive shared living environment which integrates with care services whether private or public.
4. **Promoting Independence:**
 - The **Blended Service Model** supports the mission of promoting independence by providing the right level of care at the right time, allowing residents to maintain as much autonomy as possible. The model's adaptability ensures that residents maximize self-support while still having

access to necessary support while maintaining personal relationships with access to clinical services.

5. **Person-Centered Care Integration:**

- The **Blended Service Model** naturally incorporates the **Person-Centered/Self-Directed Care** approach, ensuring that non-care supports and care plans are coordinated for individual preferences and needs. This aligns with the mission of empowering residents to take an active role in their living environment, care and engage in fulfilling activities typical in a private residence.

Feasibility Considerations:

1. **Scalability:**

- The **Blended Service Model** is scalable and can be adapted to accommodate a growing number of residents with varying levels of care needs. This makes it feasible to implement in different settings or expand over time. Residences can be open to any person otherwise Assisted Living eligible or could be directed for particular populations who choose to live together as well as for particular long-term care needs.

2. **Partnerships:**

- This model allows for strategic partnerships with healthcare providers, non-profit organizations, and community groups, which can enhance service delivery without the need for Freedom Residence Suites to directly manage the clinical aspects of care.

3. **Resource Allocation:**

- By integrating non-clinical and clinical services, the **Blended Service Model** optimizes resource allocation, ensuring that residents receive appropriate care without unnecessary duplication of services. This makes it cost-effective and operationally efficient. The shared overnight care avoids the primary cause for people needing institutional placement with reduced costs and better quality of life.

Benefits

1. Enhanced Social Connections:

- **Preservation of Personal Relationships:** Supports and maintains close relationships with spouses, children, and caregivers within the living environment.
- **Preservation of Community Involvement:** Locally based small home residences can be located in any urban or rural community retaining physical presence in the community.
- **Intergenerational Interaction:** Encourages meaningful interactions between residents of different generations, fostering a sense of community and reducing loneliness and isolation.
- **Residents Council:** A Residents' Council would be responsible for governing the living environment with participation by the residents, agents or proxies as is typical in any condo, coop or club.
- **Opportunities for Mentorship:** Provides avenues for mentorship and knowledge exchange across age groups, enriching the lives of both younger and older residents.
- **Living with Purpose:** Residents remain engaged in activities and tasks typical in living at home. Furnishing and maintaining their suites, choosing colors, menus, cooking, laundry, and other normative activities.

2. Holistic Supports:

- **Person-Centered Care:** Ensures care and services are coordinated to individual preferences, utilizing existing community-based programs to enhance the quality of life.
- **Comprehensive Well-Being:** Addresses the physical, emotional, social, and spiritual needs of residents, promoting a balanced and fulfilling life.
- **Empowerment and Autonomy:** Empowers residents to make informed choices about their care and environment, preserving their dignity and independence.

- **Inclusive and Equitable Care:** Adapts to the diverse needs of residents, ensuring that care is provided through an inclusive and intersectional approach. Self-direction is maximized, and engagement encouraged.

3. **Community Building:**

- **Community-Based Residences:** Small home residence suites can be integrated into any urban or rural settings, making them truly community-oriented and located close to services, commerce and transportation.
- **Sense of Belonging:** Cultivates a strong sense of community and belonging among residents, enhancing their overall well-being.
- **Faith and Community Integration:** Maintains and supports personal relationships within faith and community networks, reinforcing a support system with access by and to the resident.
- **Shared Experiences:** Facilitates shared experiences and mutual support among residents, strengthening community ties.
- **Active Community Engagement:** Encourages residents to participate in daily activities and engage with the wider community, leveraging existing community-based programs for additional support and oversight.

Characteristics and Needs of Residents

Disabilities: Cognitive and Functional Challenges

- **Common Traits:**
 - Residents of Freedom Residence Suites may experience cognitive and functional challenges that can occur at any stage of life, whether emerging early in life, during work-life, or as an older adult. These challenges can occur separately or together, requiring a coordinated approach to care.
 - **Functional Disabilities:** For residents with functional disabilities, including those with "skilled nursing" needs, the barrier-free living environment at Freedom Residence Suites is designed with universal design principles that not only eliminates obstacles like stairs and small bathrooms but have features that provide ease of access and transfers.

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This design fosters an engaging and safe environment, allowing residents to maintain a healthy living space with the ability to move around independently, inside or out.

- **Cognitive Disabilities:** For residents with cognitive challenges, such as Intellectual Developmental Disabilities (IDD), Traumatic Brain Injuries (TBI), or dementias, the Blended Care Model incorporates essential monitoring, prompting, and oversight. This ensures that residents can live safely and securely while receiving the support they need. The design also utilizes color, art, lighting and other cues to provide confidence for residents when moving independently.
- **Comprehensive Care:** The Freedom Residence Suites model eliminates structural barriers and provides a safe, secure, and healthy environment that can accommodate residents requiring licensed care for skilled nursing needs. The small economy of scale facilitates a cost-effective, person-centered service model, offering an alternative to traditional custodial care options and providing opportunities for shared Self-Directed or Consumer Directed programs.

Age Range:

- **Broad Age Range:** Freedom Residence Suites serves a diverse age range, from young adults to seniors. The focus is on meeting the specific needs of each resident, regardless of age, by providing a supportive and quality living environment. This approach ensures that the level of support and assistance provided is coordinated to the unique circumstances of each resident.

Other Characteristics:

- **Resident Governance:** A Resident's Council will be established to involve residents in decision-making concerning Residence operations, common interests, amenities, and resolving disputes. This empowers residents and ensures their voices are heard in the management of their living environment.

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- **Continuity of Care:** Residents will not need to transfer from the residence, even as their disability progresses or they approach end-of-life. This model supports aging in place and provides continuity of care, enhancing residents' quality of life.
- **Value-Based Care:** Freedom Residence Suites offers better value-based care by providing a healthy, safe, and supportive environment that reduces the need for hospital readmissions and increases the likelihood of better results, benefiting both resident and benefit programs.
- **Rehabilitation and Habilitation Needs:** The facility is equipped to support residents needing rehabilitation from injuries or engagement to maintain cognitive and functional abilities. Non-care support, including providing space and access to physical and occupational therapy, helps residents regain or maintain their functional abilities. The community room facilitates remote programs, common activities and recreational “competitions” amongst various community groups and internet.
- **Older Adults:** Older adults requiring habilitation to maintain their functional and cognitive abilities are a key part of the resident population. By keeping spouses together, the core family unit is preserved, which improves behavioral outcomes and reduces living costs associated with separation. The non-disabled resident is also supported which improves their quality of life as well.
- **Stable or Improving Conditions:** Many residents with developmental disabilities need a residence flexible to their needs as they age. Freedom Residence Suites provides a living environment that supports their needs and potentially those of an aging parent(s) through end of life for both. The care provided is fluid and person-focused, ensuring that current and future supports are seamlessly integrated.

Methodologies and Care Approaches

Blended Care Approach:

- **Coordination Between Care Levels:** The Blended Care Model at Freedom Residence Suites coordinates between skilled/licensed care and non-care

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supports, including monitoring, prompting, and oversight. While Medicaid and other community-based programs provide licensed care, the Blended Care Model addresses a gap in non-care supports, enhancing the quality of life for residents.

- **Monitoring, Prompting, and Oversight:** These are essential components of the care approach, particularly for residents with cognitive challenges. By maintaining relationships, creating a shared environment, and utilizing expanding AI, consistent monitoring is enhanced to promote safety. Prompting and oversight help residents engage in daily activities and maintain their routines without omnipresent supervision. The dignity of independence includes the dignity of risk. Fall risks exist in every living environment though increasing the presence of family in a shared small home residence reduces the reasons falls occur.
- **Engagement in Normative Activities:** Ensuring residents participate in everyday activities is central to a blended care approach. These activities maintain a sense of normalcy and purpose among residents. Beyond residence-based engagement, the small home residence is locally based, leveraging existing community services and outreach programs that have been refined over decades.

Barrier-Free Residence:

- **Mobility Support:** Freedom Residence Suites is designed to support residents with mobility impairments both inside and outside the facility. This includes providing space for therapies such as physical therapy (PT) and occupational therapy (OT). An exercise room will be available for all residents, promoting physical activity and wellness. Exterior areas are designed for independent access, which would be encouraged.
- **Cognitive Support:** The facility includes "dementia-friendly" design elements such as visual cues, colors, and natural barriers instead of walls, doors, and locks. These features create a supportive environment for residents with cognitive impairments.

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- **Personalized ADL Support:** Assistance with activities of daily living (ADLs) is coordinated to each resident's needs together with a service delivery entity. This support is provided under various programs, including OPWDD, MLTCP, PACE, Accountable Care Organizations, Self-Directed, or Consumer Directed programs. The goal is to provide personalized support at a cost that is potentially lower or equal to Skilled Nursing Facilities (SNFs) or Assisted Living Facilities (ALFs), making it an efficient and effective care model.

Safety and Risk Management

In-Suite Safety:

- **Risk Assessment:** Similar to living home, each resident's living environment is their private space, and the Suite design is to identify and mitigate potential fall hazards while also providing grab bars, railings, places for "3 points of contact" in transition areas such as bathroom, kitchenette and bedroom as well as common areas.
- **Safety Features:** Each suite is equipped with other safety features such as non-slip flooring, adequate lighting, and "flow through" design to reduce the risk of falls and facilitate safe passage
- **Transfer Design:** A key element is the ability to go from one sitting or standing position to another. Design elements will include these considerations to facilitate transfers and encourage movement throughout the residence.
- **Monitoring Systems:** Implementation of monitoring systems and in each suite to ensure residents can quickly access available help if needed or connect directly to licensed care services. Telehealth can also be leveraged to allow remote health monitoring, remote prompting, or as an available resource.

Common Areas:

- **Support Staff:** Common areas have a higher presence of support staff trained to assist residents with engagement, monitoring and prompting. Though they would

not be licensed care providers, they would be trained in providing resident directed non-care support and helping facilitate providing for daily needs and normative activities.

- **Resource Accessibility:** Each resident in the small home will have their own private suite of approximately 750' for one bedroom which includes bedroom, sitting area, hazard free kitchen and bathroom. The centrally located kitchen and hydration stations provide ready access for all residents. A common area bathroom would be available as well.
- **Environmental Design:** Common areas are designed with open layouts and clear pathways to facilitate easy navigation and reduce tripping hazards while encouraging resident movement which helps prevent the loss of functional ability. The challenge of finding a balance between independence and “preventing harm” is always difficult, though the residence reduces the risks that could occur in a private home there is also enhanced availability to assistance.

Addressing Unmet Needs

Hydration and Nutrition:

- A core feature of the residence is the central kitchen where there is food availability 24/7 with regular freshly prepared meals in which residents would be encouraged to choose and participate. While each suite would have a hazard-free kitchenette for personal choices, the kitchen and common table for eating is elemental to building a sense a of residence community.

The kitchen does more than just provide food security but also promotes cognitive and behavioral health. Smells, taste, sounds and engagement evoke basic emotions and prevents isolation. While each suite would have a hazard-free kitchenette for personal dietary preferences, as in any home the kitchen and dining room are focal points of food and conversation which the design promotes in all common areas.

Bathroom Accessibility:

- **Frequent Checks:** Regular “checks” and prompts for residents to use the bathroom, especially those with mobility or cognitive impairments.
- **Accessible Facilities:** Bathrooms designed for easy access with grab bars, raised or elevating toilet seats, roll in shower with seats, and emergency call systems. If needed, ceiling mounted Hoyer lift systems could also be installed.

Training and Awareness:

- **Staff Training:** The assistance to be provided by staff will be unique in application while consistent with existing models for certain currently segmented disabled populations. Though staff would not necessarily be Licensed Care Aides, they would be trained in understanding the needs of people with cognitive or functional challenges. They would be trained in self-direction to be available for assistance and engagement while also coordinating the engagement of non-disabled co-residents. For those residents in Self or Consumer Directed programs, these responsibilities could be shared and integrated with existing care management. Managed Care programs would be able to provide coordinated person-centered/directed care programs with better economies of scale than residents living in private homes.
- **Resident Education:** Educating residents, guardians, agents, or proxies that the shared residence is neither ALF nor SNF but rather a personal condo/coop residence. All have an opportunity for participating in governance and operations which is important in retaining a community environment, personal engagement and promoting independence.

Emergency Preparedness

Regular Drills:

- **Coordination with local first responder services:** Facilitate emergency response access both to the residence and residents.

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- **Safety Drills:** Conducting regular safety drills to ensure staff and residents are prepared for emergencies.
- **Feedback and Improvement:** Residence Councils and management would collect feedback after drills to improve emergency response plans continuously.

By integrating these detailed safety and risk management strategies, Freedom Residence Suites ensures a secure and supportive environment for all residents. A proactive approach to fall risk management and addressing unmet needs significantly reduces the likelihood of accidents and enhances the overall quality of life for individuals with disabilities.

Market Analysis

Target Demographics

Example Geographic Location:

- **Focus:** Orange County, NY
- **Rationale:** Orange County provides a mix of suburban and rural areas, ensuring a wide range of potential residents who may benefit from supportive care.

Age Range:

- **Young to Older Adults with one person otherwise eligible for Assisted Living:** The facility will cater to a broad age range, from young to older adults (with family/spouses).
- **Target Groups:** Adults aged 21-end of life, ensuring a comprehensive approach for care across the lifespan.

Example Disability Types:

- **Physical Disabilities:** Functional impairments affecting Activities of Daily Living, chronic health conditions.

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- **Intellectual and Developmental Disabilities:** Intellectual disabilities, developmental delays although dedicated small homes could be for any group who may choose to live together
- **Sensory Disabilities:** Hearing and vision impairments.
- **Mental Health Conditions:** Dementias, TBI, strokes, non-violent mental health disorders.
- **Acute conditions of long duration:** Long-term rehabilitation, Trauma, Dystrophies, Scleroses, Spina Bifida, Cerebral Palsy as examples

Market Needs

Market Needs in Orange County, New York

New York State:

- **Significant Population:** New York State has a considerable population requiring non-clinical support services. According to the U.S. Census Bureau, approximately 11.5% of New York State's population has a disability, indicating substantial local demand for supportive services.

Orange County Specific Data:

- **Population with Disabilities:** In Orange County, approximately 9.7% of the population has a disability, based on the American Community Survey (ACS). This indicates a significant number of individuals who may benefit from the services provided by Freedom Residence Suites.
- **Aging Population:** Orange County has a growing aging population, with about 15.6% of residents being 65 years and older. This demographic trend suggests an increasing need for supportive services for older adults with disabilities.
- **Income Levels:** The median household income in Orange County is around \$76,300, with a poverty rate of approximately 10.5%. These figures highlight the need for affordable care solutions that provide high-quality support without imposing a significant financial burden on residents and their families.

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Competitive Landscape:

- Existing Facilities:** There are limited community-based housing options in Orange County for people with disabilities regardless of type or age of onset and all are in crisis. These include young adults with developmental disabilities who need non-clinical, supportive assistance as well as those with chronic or acute needs which other than Self-Directed programs are in Group Homes. There is a gap in services for adults with work-life disabilities, with many losing homes, being separated from spouses, and both compelled to poverty. For Older Adults, the choice is usually congregate custodial care - either an ALF or SNF. Almost all facilities require parents, disabled adult children and spouses to be separated by rule or economic realities. The system requires imposed transfers as a person's condition worsens with less ability to behaviorally understand or adjust and almost always destined for impoverishment.
- Gaps in Service:** A shortage of facilities offering comprehensive support for daily living activities, social engagement, and employment support for adults with disabilities exist in the region. This gap presents an opportunity for Freedom Residence Suites to fill a critical need in the community. Either the resident or co-resident will be able to access workspace or community.
- “Go Somewhere”:** Current options are typically complexes, large custodial care facilities (ALF/SNF) or Group Homes. The Residence Suites offer an option for a privately occupied suite residence while also having access to a shared area in a small home residence located in the community. Residents remain in their locality and maintain important relationships instead of “going somewhere”.
- Poverty:** Couples owning a home are typically required to sell their home or live apart if one requires an ALF or SNF. Equity is either lost or spent and upon impoverishment both become fully dependent on public benefits. Private ownership of the Suite Residence facilitates the preservation of assets consistent with existing Medicaid/Waiver programs.

Demographics and Needs Assessment

Population:

- **Target Group:** Adults with disabilities, aged 21-end of life, residing in the community.
- **Disabilities:** All populations regardless of type of disability or age of disability onset.

Support Needs:

- **Daily Living Activities:** Assistance with tasks such as cooking, cleaning, and personal care prompting.
- **Social Engagement:** Opportunities for social interaction, recreational activities, and community involvement.
- **Employment Support:** Facilitate job coaching, vocational training, and employment placement services.
- **Healthcare Coordination:** Integration of nutritional needs, engagement, and non-care supports with licensed care givers whether self/consumer directed or through existing MLTCP, PACE or ACO, other type of managed care.

Resident Profiles

Age Distribution:

- **18-30 years:** 20%
- **31-45 years:** 30%
- **46-65 years:** 35%
- **65+:** 15%

Key Insights

1. **Population Demand:** With 11.5% of New York State's population having a disability, there's a significant demand for non-clinical support services.

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2. **Age Range and Disabilities:** The facility will serve a diverse age range and cater to various disabilities, ensuring a comprehensive support system.
3. **Competitive Advantage:** By focusing on non-clinical support for adults with disabilities, the facility fills a critical gap in the existing service landscape.
4. **Comprehensive Services:** Addressing normative activities, social engagement, employment support, and assist in healthcare coordination ensures a holistic approach to care.

Comprehensive Service Offerings and Market Analysis

1. Social Activities:

- **Weekly Social Events:** Regularly scheduled social events to foster community engagement and reduce social isolation.
- **Intergenerational Mentorship Programs:** Programs pairing younger and older residents for mutual support and learning.
- **Community Based Services:** Facilitate access and outreach to community-based services, senior and faith based organizations for religious needs, shopping, trips to local attractions, parks, and cultural events.

Research Evidence: Studies have shown that social activities significantly improve mental health and reduce feelings of loneliness among people with disabilities. Intergenerational programs, in particular, have been found to enhance social skills and provide emotional support to participants.

2. Health Services:

- **Regular Health Check-Ups:** The Residence can facilitate routine medical examinations to monitor and maintain residents' health as well as access to telehealth.
- **Mental Health Support:** Access to counseling and mental health services, whether push-in, peer services, or behavioral support.

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- **Fitness Programs:** Exercise programs promoting residents' physical health and well-being.

Research Evidence: Access to regular health services and mental health support has been proven to improve overall health outcomes and quality of life for individuals with disabilities. Fitness programs are particularly beneficial in maintaining physical health and preventing secondary conditions.

3. Daily Living Support:

- **Assistance with Cooking:** Helping residents with meal preparation to encourage independence and healthy eating habits.
- **Cleaning:** Ensuring a clean and safe living environment.
- **Personal Care:** Monitoring and prompting daily hygiene and personal care activities.

Research Evidence: Providing support with daily living activities enhances the independence and self-esteem of individuals with disabilities, enabling them to live more fulfilling lives.

Service Overview

Freedom Residence Suites will operate with a "Blended Service Model" that integrates non-clinical support services with strategic partnerships for clinical care. The facility will consist of two apartment buildings on a 5-acre property in Orange County, NY, featuring barrier-free suites designed for inclusivity and community integration. Key services will include housekeeping, meal preparation, social activities, and transportation, with access to additional community-based services.

The residence would offer a range of personalized services designed to foster a community environment through shared meals and activities. Below is a detailed breakdown of the services provided, service providers, clinical services, broker reimbursement, and day-to-day operations.

Simplified Supportive Model – Services to be provided

1. Concierge Services

- **Personal Assistance:**
 - **Support Tasks:** Prompting and assisting in coordinating scheduling of appointments, transportation, and daily activities.
- **Information and Referrals:**
 - **Service Details:** Provide residents with information about local services, amenities, and events. Recommend residents to external and community-based services when needed.
- **Activity Coordination:**
 - **Event Management:** Organize and manage logistics for in-house activities and events to ensure smooth operation and maximum resident participation.

2. Common Space Cook

- **Meal Preparation:**
 - **Nutritious Meals:** Prepare nutritious meals in the shared kitchen area, catering to dietary restrictions and preferences.
- **Resident Engagement:**
 - **Community Involvement:** Encourage residents to participate in meal planning and preparation to foster a sense of community.
- **Nutrition Education:**
 - **Healthy Eating:** Provide information about healthy eating habits and help residents make informed dietary choices.

3. Housekeeping and Maintenance

- **Common Area Upkeep:**
 - **Clean Environment:** Regularly clean and maintain common areas to ensure a clean, safe, and welcoming environment.

- **Exterior areas:** would be of dementia/cognitive care design with natural barriers and electronic integrated information technology.
- **Resident Suites:**
 - **Hygiene and Comfort:** Provide availability for routine cleaning services for individual suites to maintain hygiene and comfort.

4. Meals

- **Daily Nutrition:** Provide residents with access to three nutritious meals daily, prepared by the common space cook (guided by the residents and not needed continuously).

- **Resident Participation:**
 - **Engagement:** Encourage residents to participate in meal planning and preparation to promote engagement and community involvement.

5. Laundry and Kitchen Facilities

- **Laundry Areas:**
 - **Accessibility:** Provide accessible laundry facilities for resident use.
- **Hazard-Free Kitchens:**
 - **Safety:** Equip each suite with a hazard-free kitchen, including microwaves, to ensure safety while allowing residents to prepare their own meals if they wish.

Partnership for Enhanced Clinical Service Delivery - Facilitation through Partnerships

Freedom Residence Suites Leadership Initiatives:

1. **Strategic Partnerships:**
 - Freedom Residence Suites leadership will actively identify and collaborate with entities that can add significant value to a self-care model, particularly in the areas of clinical and non-clinical services.

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- The concept will leverage existing contracts or establish new alliances to seamlessly integrate essential services into operations.
- 2. Resource Sharing:**
- Freedom Residence Suites will explore partnerships that allow for the sharing of resources such as staff training, clinical expertise, and operational best practices, aiming to enhance care quality while optimizing costs.
- 3. Community Engagement:**
- The concept seeks to maintain a strong emphasis on community-based services and the preservation of personal supportive relationships, ensuring that residents remain engaged and connected within their communities.
- 4. Operational Efficiency:**
- Leadership will seek opportunities to optimize resources and explore the potential for scaling the Freedom Residence Suites model to serve more residents effectively and efficiently, including grouping residences together to facilitate shared exterior areas

Marketing and Sales Strategy

Marketing Strategy:

- **Target Market:**
 - **Primary Audience:** Families of individuals with disabilities, caregivers, attorneys, financial planners, and social workers seeking comprehensive care solutions.
 - **Secondary Audience:** Healthcare providers, government agencies, and community organizations.
- **Partnerships and Collaborations:**
 - **Healthcare Providers:**
 - **Objective:** Partner with local hospitals, clinics, and specialists to provide integrated care.

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- **Community Organizations:**
 - **Objective:** Collaborate with local non-profits and community groups to enhance service offerings and increase visibility.
- **Government Agencies:**
 - **Objective:** Engage with government agencies to secure funding and endorsements.
- **Local Outreach Initiatives:**
 - **Community Events:**
 - **Objective:** Host and participate in community events such as health fairs, open houses, and educational workshops.

Why Choose This Facility:

Comprehensive Comparison Chart: Living at Home vs. Freedom Residence Suites vs. Traditional Retirement Home

Expense Category	Living at Home	Freedom Residence Suites	Traditional Retirement Home
Housing Costs			
Monthly Expense	\$1,500/month	\$3,662/month	\$5,500 - \$8,500/month
Property Taxes	\$300/month	Included	Included
Home Insurance	\$100/month	Included	Included
Maintenance/Repairs	\$200/month	Included	Included
Utilities (electricity, water, etc.)	\$200/month	Included	Included
Total Housing Costs	\$2,300/month	\$3,662/month	\$4,000 - \$6,000/month
Living Costs			
Groceries	\$500/month	Bulk purchase savings	Included

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Housekeeping	\$100/month	Included	Included
Home Security	\$50/month	Included	Included
Transportation (gas, maintenance)	\$200/month	Included	Included
Total Living Costs	\$850/month	Included	Included
Healthcare Costs			
Health Insurance Premiums	\$400/month	\$400/month	\$400/month
Medications	\$100/month	\$100/month	\$100/month
Doctor Visits/Co-pays	\$100/month	\$100/month	\$100/month
In-Home Care Services	\$2,000/month	Included	Included
Total Healthcare Costs	\$2,600/month	\$600/month	\$600/month
Additional Support Services			
Concierge Services	\$100/month	Included in \$3,662/month fee	Included
Common Space Cook	N/A	Included in \$3,662/month fee	Included
Housekeeping and Maintenance	\$100/month	Included in \$3,662/month fee	Included
Social and Recreational Activities	\$100/month	Included – Engage	Included
Health and Wellness Programs	\$100/month	Included - Engage	Included
Transportation Services	\$100/month	Included – One van	Included

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Emergency Call Systems	\$50/month	Included	Included
Total Additional Support Services	\$550/month	Included in \$3,662/month fee	Included
Total Monthly Costs	\$5,750/month	\$4,262/month	\$5,000 - \$7,500/month

Summary: Quality of Life Comparison

Living at Home

Independence: Living at home offers the highest level of independence, but it also comes with the burden of maintaining a home and managing all daily activities and healthcare needs.

Cost: Monthly costs are high, especially with in-home care services, maintenance, and utilities. Unexpected home repairs can add financial stress.

Social Interaction: Social interactions may be limited to family visits and community engagements, which can be challenging for those with mobility issues.

Healthcare: Requires arranging for in-home care services, which can be costly and logistically challenging. Access to healthcare is not integrated and may require frequent travel.

Freedom Residence Suites

Independence with Support: Residents enjoy a balance of independence and support, with private living spaces and access to comprehensive services.

Cost-Effective: The all-inclusive monthly fee covers housing, meals, housekeeping, healthcare services, and social activities, reducing the financial burden and preserving assets. Groceries are charged to the tenant but at a savings due to bulk purchasing.

Social Interaction: Offers a vibrant community with regular social and recreational activities, fostering meaningful interactions and reducing feelings of isolation.

Healthcare: Integrated healthcare services, including regular health check-ups, mental health support, and wellness programs, ensure comprehensive care without the need

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for travel.

Quality of Life: High, due to the supportive environment, reduced financial stress, and enhanced social engagement. The model promotes autonomy, dignity, and a sense of community.

Traditional Assisted Living

Independence: Varies depending on the facility; some offer private living spaces while others have more communal living arrangements.

Cost: Monthly costs can be high, ranging from \$7,500 \$10,000 or more, which can quickly deplete assets. Additional costs may arise for higher levels of care.

Social Interaction: Offers structured social and recreational activities, but the quality and frequency can vary by facility.

Healthcare: Healthcare services can be integrated, but many times are limited by the licensing of the facility and the level of personalized care can vary. Some facilities may feel more institutional.

Quality of Life: Generally good, but highly dependent on the quality of the facility. Higher costs may lead to financial stress and reduced autonomy.

Strategic Goals

Preserving Personal Assets:

- Develop strategies that enable individuals to work, live, and invest their money, preserving their assets and maintaining independence.
- Utilize income and assets for their best purpose. Couples live cheaper than singles and shared residences are cheaper than multiple single residences.
- Financial resources are preserved through Medicaid home ownership exemptions providing personal assets for monthly expenses while also taking advantage of expanded marital exemptions.
- Special Needs Trusts, whether self-settled or third party, preserve assets and utilized for residential costs.

- Facilitates the resident, “working” spouse, child or parent to maximize their ability to generate income.

Economic Sustainability:

- The overarching goal is to create a model that is replicable and economically sustainable, reducing individuals' dependence on external systems while facilitating their long-term independence.
- Private suite ownership facilitates resource preservation through exemptions. For many older adults these are “house rich, cash poor” individuals or couples.
- Rental units facilitate those who are “cash rich, but house poor” but also provides the opportunity for investment in an exempt asset or utilize for monthly costs.
- Supported or Subsidized Housing programs can be integrated consistent with existing guidelines and provide an affordable option into which assets can be invested or preserved in an exempt resource to facilitate dependency avoidance.
- For groups of people with common disabilities who may choose to live together, the model allows shared service delivery more economically than living separately. Self-Directed or Consumer Directed programs can facilitate combined budgets and shared services that are person centered.

Freedom Residence Suites offers a superior quality of life compared to living at home or in Assisted Living. The comprehensive services, cost-effective model, and supportive community environment ensure that residents receive high-quality care while preserving their assets. This model provides a balanced approach to independence and support, enhancing social interactions, reducing financial stress, and promoting overall well-being.

- **Quality of Life:** Opportunities for independence, remaining with loved ones, and enjoying integrated indoor and outdoor environments.

Many people with disabilities are unable to live in a private residence or apartment for many reasons. These include progressive functional or cognitive challenges in homes with structural barriers (ex. stairs and small bathrooms), unsafe or

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unsanitary conditions, lack of support for daily needs (ex. nutrition), an inability to maintain the home, expenses, or simply don't want the isolation. Overnight care is too expensive privately and realistically unavailable through benefit programs. Consequently, due to the lack of available housing options for all populations with disabilities, congregate care in ALF or SNF is compelled. Beyond the separation of families, a person is provided comprehensive services they may not need in institutional facilities that typically are not home-like and also requires a person to live according to the facility's schedule including personal needs and meals.

Freedom Residence Suites provide the privacy and dignity of a personal residence while also providing access to supports and community. Families stay together and continue the symbiotic relationships and mutual support otherwise lost to separation. As residences are intended to be small and community located, faith and social relationships are maintained. The shared residence provides a small community as well as access to other community-based services whether "push in" or outside programs.

Natural lighting, the smells, sights and sounds of cooking, privacy or community, provides a true home environment that enhances and promotes independence in circumstances that are understandably challenging.

Exterior areas are independently and directly accessible to residents with natural barriers of bushes, garden fences and guided walkways rather than walls, doors and locks. In providing a safe environment, others in the community with cognitive challenges could also visit, providing respite to caregivers and increased opportunities for a variety of community engagements. Playgrounds, dog park, or other community magnets would also encourage intersectional and intergenerational interactions which prevent isolation depression and reduce negative behaviors.

The quality of life for the "non-disabled" co-resident is also enhanced as the responsibilities of caregiving need not be carried alone. Assistance would be available from both caregivers as well as residence staff for daily needs they could not otherwise provide in a supportive environment that is sanitary with proper nutrition.

- **Cost and Support:** Reduced living costs with access to necessary supports to avoid ALFs/SNFs.
 - **It is axiomatic that two live more inexpensively than separately and shared residences reduce costs compared to separate private residences.** Condos, coops and clubs are well established shared living environments. Non-care supportive living environments are common and those constructed to be barrier-free are no more costly than traditional designs.
 - **Person centered and directed care is less costly than SNF custodial care.** Many SNF residents do not require the comprehensive care the facility is designed to provide as a “one size fits all” solution. Licensed or skilled nursing staff is responsible for providing non-care services and strained to provide appropriate monitoring, oversight or prompting. Staff also become responsible for replacing personal relationships or explaining why family members are no longer present and challenged to handle associative negative behaviors. Consequently, costs increase to address the consequences of separation and transfer trauma resulting from the loss of a home environment and relationships.
 - **Residents maximize resources and income.** Rather than assets and income being used as an offset to the costs of congregate care they are utilized to *avoid* congregate care and dependency upon Nursing Home Medicaid or being “placed” in a Group Home at a benefit cost exceeding \$200,000 per year. Residents could potentially avoid impoverishment and poverty which would otherwise compel Medicaid dependency.

Operational Plan

Freedom Residence Suites will operate with a "Blended Service Model" that integrates non-clinical support services with strategic partnerships for clinical care. The facility will consist of two apartment buildings on a 5-acre property in Orange County, NY, featuring barrier-free suites designed for inclusivity and community integration. Key services will include housekeeping, meal preparation, social activities, and transportation, with access to additional community-based services.

Core Services:

- **Concierge Services:** Assisting with scheduling, transportation, and local resources.
- **Meal Services:** Shared kitchen facilities and a common cook promoting community engagement.
- **Housekeeping and Maintenance:** Regular cleaning of common areas and private suites.
- **Community Activities:** Social events, fitness programs, and resident councils to foster community ties.

This operational model supports a flexible and inclusive environment that adapts to varying resident needs while optimizing resource use through shared services and partnerships.

Detailed Scalability Plan

Scalability Overview:

Freedom Residence Suites has been designed with scalability in mind, ensuring that the model can be expanded both geographically and within the existing location to meet

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growing demand. The scalability plan focuses on two key areas: expanding to new locations and increasing capacity at the current site.

Geographic Expansion:

- **Market Research and Feasibility Studies:**
 - **Objective:** Conduct market research and feasibility studies in targeted regions to identify demand, competition, and regulatory requirements.
- **Modular Construction:**
 - **Objective:** Use modular construction techniques for new locations to reduce construction time and costs while maintaining consistent quality across facilities.
- **Partnerships with Local Developers:**
 - **Objective:** Partner with local real estate developers in target regions to secure prime locations and favorable lease terms for new facilities.

Scaling Within Existing Location:

- **Adaptive Reuse of Space:**
 - **Objective:** Evaluate and repurpose underutilized areas within the existing facility to increase capacity and service offerings.
- **Vertical Expansion:**
 - **Objective:** Where zoning and structural considerations permit, explore vertical expansion options to add additional floors to the existing facility.
- **Service Line Extensions:**
 - **Objective:** Introduce new service lines such as telehealth, specialized care programs, and community outreach initiatives to generate additional revenue streams and attract a broader demographic.
- **Technology Integration:**
 - **Objective:** Scale operations through the integration of advanced technology, including AI-driven care management systems and digital health platforms.

Detailed Partnerships Strategy

Partnership Establishment:

- **Healthcare Providers:**
 - **Objective:** Form partnerships with local hospitals, clinics, and specialists to ensure seamless integration of clinical services for residents.
- **Educational Institutions:**
 - **Objective:** Partner with local universities and vocational schools to develop internship and training programs for students in healthcare, social work, and hospitality.
- **Government Agencies:**
 - **Objective:** Collaborate with government agencies such as the Office for People With Developmental Disabilities (OPWDD) and local housing authorities to secure funding, compliance support, and service integration.
- **Technology Partners:**
 - **Objective:** Partner with technology companies to integrate advanced care management systems, telehealth platforms, and cybersecurity measures into the facility's operations.

Partnership Management:

- **Dedicated Partnership Manager:**
 - **Objective:** Appoint a dedicated Partnership Manager responsible for overseeing all partnerships, ensuring alignment with the facility's goals, and maximizing the benefits of each partnership.
- **Regular Partnership Reviews:**
 - **Objective:** Conduct regular reviews of each partnership to assess performance, address challenges, and identify opportunities for improvement.
- **Collaborative Initiatives:**

- **Objective:** Develop collaborative initiatives with partners, such as joint community outreach programs, co-branded events, and research projects.

Project Costs

Detailed Breakdown for \$10.75MM Project with 42 Units

Construction Costs and Necessary Modifications

Category	Details	Cost
Total Project Cost		\$10,750,000
Number of Units	42 units (1 and 2 BRs)	
Cost per Unit		\$255,952
<u>Breakdown of Construction Costs</u>		
Land Acquisition		\$500,000
Site Preparation and Foundation		\$1,500,000
Construction of Units	1-BR Units: \$2,000,000	\$4,000,000
	2-BR Units: \$2,000,000	
Common Spaces Construction		\$1,500,000
Elevator Installation and Modifications	Enlarging and redirecting elevators: \$250,000	\$500,000
	Elevator installation: \$250,000	
Mechanical, Electrical, and Plumbing (MEP)		\$800,000
Interior Finishes and Furnishings		\$600,000

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Category	Details	Cost
Contingencies		\$600,000
Necessary Modifications		
Elevator Modifications	Enlarging and redirecting elevators to improve accessibility	\$250,000
Building Modifications	Structural adjustments for the elevator	\$150,000
	Redesign of common spaces to ensure accessibility	\$100,000

Short Term Working Capital

Category	Details	Cost
Line of Credit	Short term working capital	\$250,000
Use of Funds	Bridge financing for construction costs, unforeseen expenses, and operational needs during the initial phase	
Repayment Terms	Short term, to be repaid as units are sold or rented	

Zoning Plan

Category	Details	Cost
Zoning Classification	Verify and ensure residential use	
Rezoning Application (if necessary)	Cost for Rezoning Application, Timeframe: 6-12 months	\$50,000
Compliance with Zoning Ordinances	Building height restrictions, setback requirements, density limits	
Community Engagement	Conduct community meetings	

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Category	Details	Cost
Environmental Impact Assessment	Perform assessments to ensure compliance	\$100,000

Conclusion

Freedom Residence Suites embodies a transformative approach to supporting individuals with disabilities across all age groups, seamlessly integrating non-clinical and clinical services within a holistic care environment. The Blended Care Model emphasizes the importance of creating a supportive, inclusive, and community-oriented living space that addresses the physical, emotional, and social needs of each resident. Through strategic planning and a commitment to excellence, a nurturing and empowering community is offered where residents can lead fulfilling and independent lives. The vision extends beyond immediate care, laying the groundwork for a future where inclusive, supportive, and community-oriented living environments are the norm.

Financial and Operational Viability

With a solid financial plan and a robust operational model, Freedom Residence Suites is well-positioned to make a significant impact in the field of disability support. The Blended Care Model combines comprehensive non-clinical services—such as housekeeping, meal preparation, and social activities—with coordinated clinical care, ensuring that every aspect of residents' well-being is addressed. By strategically leveraging both onshore and offshore support, substantial cost savings can be achieved while maintaining high-quality care, making the model not only replicable and sustainable but also adaptable to the evolving needs of all disabled populations..

Savings for OPWDD and Residents

The approach offers significant savings for the Office for People With Developmental Disabilities (OPWDD) and for the residents themselves. By providing comprehensive non-clinical support within a community-based setting, reliance on more expensive institutional care models is reduced. The cost of supporting an individual in the residence is significantly lower than traditional care options, resulting in substantial savings for OPWDD. At the same time, residents benefit from lower living costs while receiving coordinated, high-quality support services that meet their unique needs and promote their independence.

Quality of Life and Community Integration

Freedom Residence Suites is designed to enhance the quality of life for individuals with disabilities through a comprehensive and integrated care approach. By offering a wide range of services—including health check-ups, mental health support, fitness programs, and social activities—that residents receive holistic care that addresses all aspects of their well-being. A commitment to accessibility and strict adherence to regulatory standards further support the health and safety of residents. The inclusive environment fostered promotes active community integration, enabling residents to participate fully in social, recreational, and employment opportunities, thus enriching their lives and contributing to their overall independence and well-being.

Future Impact and Sustainability

The Blended Care Model will not only improve the lives of residents but also serve as a sustainable and scalable blueprint for future developments in supportive housing. By continuously measuring outcomes, embracing technological advancements, and focusing on quality improvement, and aiming to set new standards in disability support services. Strategic partnerships with OPWDD, healthcare providers, non-profit organizations, and community groups ensure alignment with best practices and being responsive to the evolving needs of the individuals and families served.

Strategic Advantages

- **Cost Efficiency:** Significant reductions in operational costs are achieved through the strategic use of Business Process Outsourcing (BPO) and Knowledge Process Outsourcing (KPO) services, allowing us to deliver high-quality care at a lower cost while remaining flexible and responsive to changes.
- **Comprehensive Care:** The Blended Care Model addresses the diverse needs of residents through a broad spectrum of non-clinical and clinical services, ensuring that every aspect of their well-being is covered and that they receive the personalized care they deserve.
- **Regulatory Compliance:** The concept adheres to all relevant regulations, including those set by the Department of Health (DOH), the Americans with Disabilities Act (ADA), and local housing authorities, ensuring the highest standards of care, safety, and accessibility for all residents.
- **Quality Assurance:** Ongoing quality improvement initiatives, coupled with robust feedback mechanisms and data-driven insights, allow us to continually enhance service delivery, ensuring that residents receive the best possible care and that the model evolves with emerging best practices.

Freedom Residence Suites represents a forward-thinking approach to disability support, blending cost-efficiency with comprehensive care to create a model that benefits both residents and the broader community. By fostering an inclusive, supportive, and engaging environment, the stage is set for a future where individuals with disabilities can thrive, live independently, and contribute meaningfully to their communities.