

McGregor

A name Greater Clevelanders have lived by for 145 years.



2023 IMPACT SUMMARY

From the CEO



I am honored to welcome you to our Impact Summary for 2023. As we reflect on the past year, I am immensely proud of the remarkable achievements and resilience demonstrated by our dedicated team. In the face of unprecedented challenges, we have not only weathered the storms but emerged stronger and more agile than ever.

Ann Conn, CPA, MBA
President and CEO

Our commitment to innovation, sustainability, and customer satisfaction has been the driving force behind our success. Throughout the year, we have continued to invest in cutting-edge technologies, foster a culture of collaboration, enhance the culture within our organization and adapt to the evolving needs of our dynamic market.

The 2023 Impact Summary provides a comprehensive overview of our financial performance, strategic initiatives, and the positive impact we have made on our community. It showcases our unwavering dedication to creating long-term value for our residents and families, employees, and partners.

I extend my heartfelt gratitude to our team for their hard work and dedication, our customers for their trust, and our board members for their continued support. Together, we are shaping the future of our community, and I am confident that our collective efforts will propel us to even greater heights in the coming years.

Thank you for your ongoing commitment to McGregor.

Sincerely,

Ann Conn,
President and Chief Executive Officer, McGregor

THANK YOU TO OUR DEDICATED BOARD MEMBERS

McGREGOR BOARD OF DIRECTORS 2024

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President and Chief Executive Officer (ex-officio)

Susan O. Althans –

Director of Philanthropy and Secretary to the Board

From the Board Chair



To our Board Members & Executive Leadership,

I would like to express my heartfelt gratitude and appreciation to each and every one of you for your outstanding contributions to the McGregor organization this past year. As the Chair of the Board, I am continuously inspired and impressed by the dedication, passion, and hard work demonstrated by our esteemed Board members and Executive Leadership.

Kate Fox Nagel, DrPH, MPH
McGregor Board Chair

Together, we have achieved numerous milestones and successes that not only have enriched the lives of those we serve but also have elevated McGregor as a true leader in the senior services industry. From innovative programs and initiatives to unparalleled community engagement, each of you has played an integral role in our collective achievements.

I am incredibly proud of what we have accomplished together, and I am confident that with your continued dedication and support, McGregor will reach even greater heights in the years to come. Your passion for our mission and your willingness to go above and beyond are truly commendable, and I am grateful to work alongside such an exceptional team.

Please accept my sincere thanks for your invaluable contributions and unwavering commitment to our shared goals. Your hard work, dedication, and leadership are deeply appreciated, and I look forward to continuing this journey of success together.

With gratitude,

Kate Fox Nagel, DrPH, MPH
Board Chair, McGregor

Executive Leadership Team

Ann Conn, CPA, MBA

President and CEO The McGregor Foundation

Jennifer Hayes

Chief Financial Officer

Lee Ann O'Brien, CMP, CECC, MBA

Chief Marketing Officer

Sandra Mauldin, PHR, SHRM-CP

Human Resources Director

Susan O. Althans

Director of Philanthropy and Secretary to the Board

Tangi McCoy, LNHA, MPA

Chief Executive Officer, McGregor PACE

Yvette Bozman-Wright, LNHA

Executive Director, Residential Housing

Never underestimate the impact you have

The McGregor Foundation has awarded 755 grants to 140 organizations for a total of **\$18 million** Since November 2002
 In 2023, there were 39 grants awarded for **\$847,460**



BigHearted BLOOMS is an organization that uses recycled flowers to make bouquets for surprise deliveries to care facilities. The focus of their deliveries is to improve individuals' emotional health and lessen the impacts of social isolation and loneliness. BigHearted BLOOMS received a grant from The McGregor Foundation to support the growth of their organization. Last summer, they reached over 30,000 deliveries since opening in 2018!



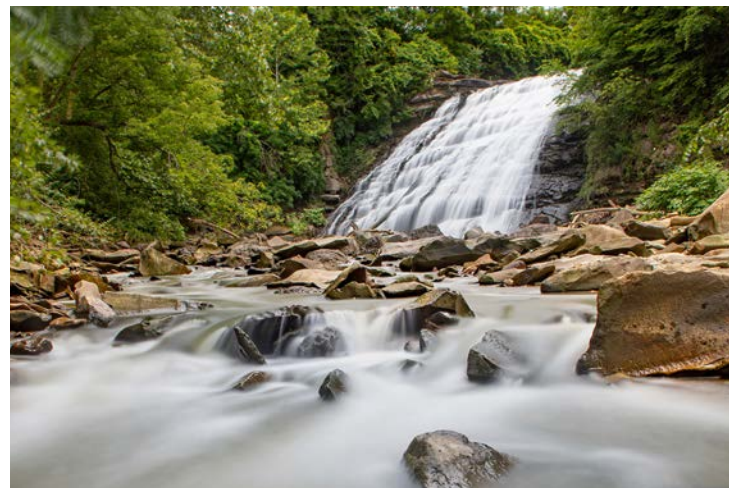
The Legal Aid Society of Cleveland is an organization whose mission is to help low-income individuals with legal services and advocate for the change of various policies. The Legal Aid Society advises and represents older adults in all legal matters related to healthcare benefits, property title, survivorship deeds, advanced directives, and other forms of wealth preservation. The Legal Aid Society received a grant from The McGregor Foundation in support of legal services for older adults.

Using online portals, medical legal partnerships, and holding advice clinics throughout spaces in local communities, The Legal Aid Society is able to locate the older adults that would benefit from the services they can provide. They hold about 90 advice clinics each year that give older adults and people within the community the opportunity to ask questions and learn new information.



Cleveland Metroparks

The Cleveland Metroparks was established in 1917, with a mission to protect nature, connect communities, and inspire conservation of our world. The Cleveland Metroparks is planning to restore Forest Hill Park in East Cleveland, which is a large green-space that provides much value to its community. Their goal is to make Forest Hill Park a safe space for people to experience nature and all of the amenities this park has to offer. The Cleveland Metroparks received a grant of \$100,000 from The McGregor Foundation to support the restoration.



The McGregor Foundation to support the restoration.



Senior Citizen Resources is an organization that provides local seniors with varying social activities, home delivered meals, transportation, and other valuable services. Senior Citizens Resources has been around for 51 years and has been committed to serving the large neighborhood of Old Brooklyn and the growing population of older adults. They have a large number of social activities that seniors are welcome to participate in, including art and music classes, yoga, Tai Chi, swimming, hiking, gardening, and many more! Senior Citizens Resources received a grant from The McGregor Foundation for operating support for services they provide.



Spanish American Committee
for a better community

The Spanish American Committee (SAC) supports Latino individuals and families throughout Northeast Ohio with a variety of services. They specifically support seniors with navigating benefits, social services, food, medical services, and various other resources. SAC received a grant from The McGregor Foundation



that will help them to pinpoint more specific needs and provide more intentional services for their seniors.



Since 2002, The McGregor Foundation has carried McGregor's mission to all of Cuyahoga County beyond the organization's East Cleveland campus.

The Foundation continues to focus on workforce recruitment and retention, and on agencies that provide wrap-around services that enhance the safety and well-being of seniors.

We support organizations, both small and large, that deliver a range of programming that address basic needs, safety, and access to critical resources that promote stability.

The Foundation believes that advocacy efforts at the local, state, and federal levels are critical to overarching policy and funding decisions that drive systems of care, reimbursement, and housing availability. By partnering with organizations in this work, McGregor is able to leverage far greater impact across a range of issues.

Strategic Direction



Our focus is on four strategies:

- Advocacy
- Growth
- Quality of Care
- Workforce

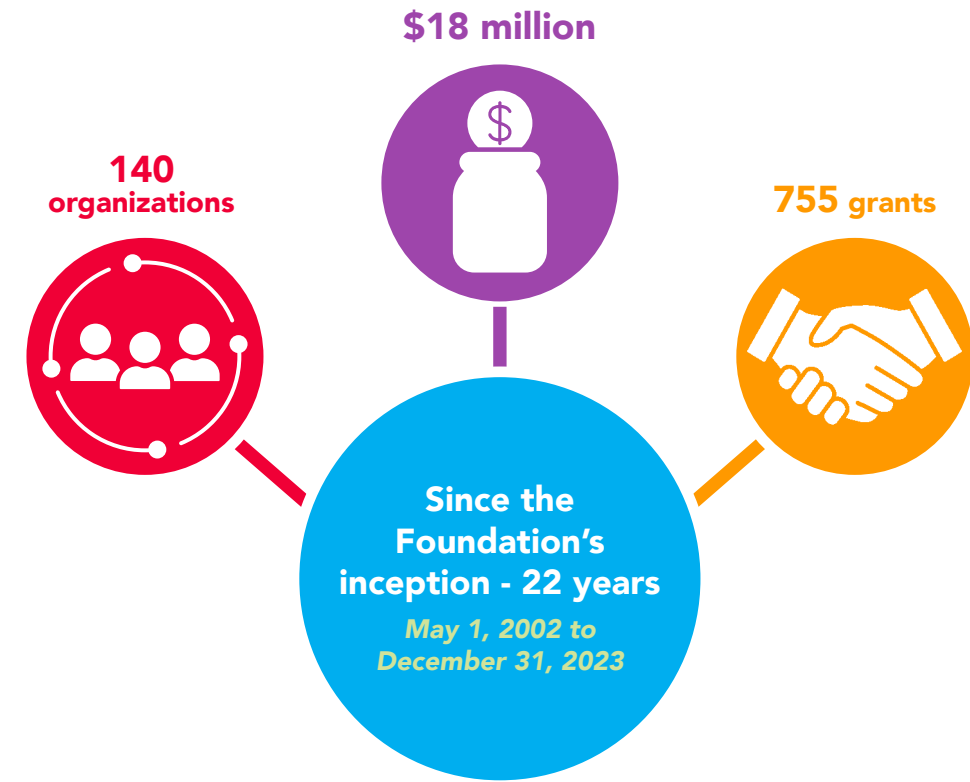
2030 Strategic Direction

- McGregor will continue as a significant provider of senior healthcare and housing services, with an emphasis on community-based initiatives. We will deliver services that respond to community need and collaborate with partners to serve the community most effectively and efficiently, with excellent clinical and service quality.
- We will complement our service delivery by being a strong and effective advocate for seniors, influencing policy at the local and state level to support successful aging in a place people call home.
- In support of this endeavor, McGregor will be an employer which is known for its excellence, strong culture, learning environment and sense of employee belonging and its commitment to diversity, empowerment, equity, inclusion, and belonging.

McGregor is committed to advocating for the resources needed to support older adults in our community. Advocacy plays a pivotal role in ensuring the federal, state and local resources are available to support quality service delivery, train and attract caregivers, and boost community-based options for every older adult. Through targeted advocacy efforts, McGregor will raise awareness concerning the challenges within the senior service industry and promote policy change to enhance how the community approaches senior care.

This synergy between advocacy, growth, quality of care, and workforce ensures that McGregor can adapt to evolving challenges while delivering exceptional care to seniors.

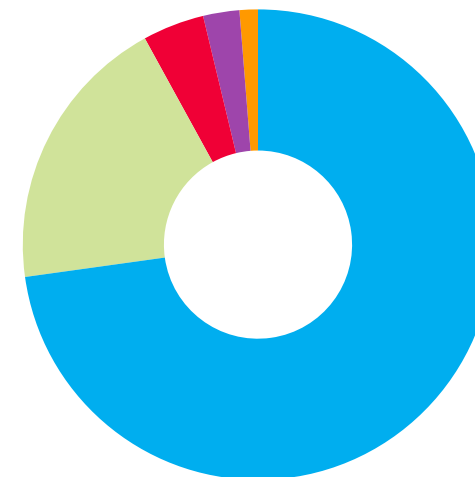
Community Impact



Operations:

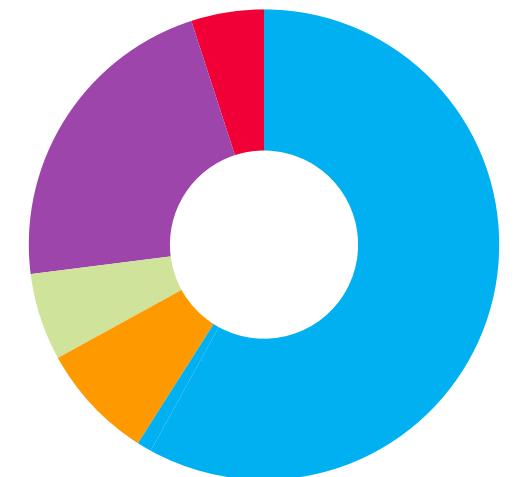
2023 Revenue In Thousands

• PACE	59,024
• Rehabilitation	15,575
• Independent Living	1,023
• Assisted Living	3,434
• Hospice	2,021
Total	81,077



Grants:

• Affordable Housing 23 grants	58%
• Workforce 2 grants	<6%
• Total quality of life 4 grants	8%
• Advocacy 5 grants	6%
• Community projects 5 grants	22%



PACE: Live at Home. Your Goal. Our Priority!



My name is Cynthia Bina. I'm an internist and geriatrician and the Medical Director here at the McGregor PACE program.

I've been with the PACE program for 13 years and have worked at all the centers. Most recently I've spent my time doing clinical work over at the Old Brooklyn Center which moved to its new location at the beginning of December. We are all just ecstatic to be in such a new beautiful facility. As we grew to serve more and more people, we needed more space for physical therapy, for day center attendance, to be able to provide improved meals and have more room in the clinic.

Here at the new Brooklyn location, we serve 241 participants as of December 1st, but we have lots of room for many more people. Currently we serve all of Cuyahoga County between the three centers, and we've spent the past 13 years really honing our skills and how to best take care of these folks who have a variety of disabilities and are struggling to take care of themselves but now want to age gracefully in their home.

Each Center has its own beautiful personality. Here at Brooklyn, about 40% are Spanish speaking as their primary language and there's a lot of fellowship.

PACE is a national program that was started in the 1970s to serve people as they age who did not want to grow old in a nursing home but really preferred to stay in their home and in the community. The criteria for being in Pace is to be 55 years of age or older, live in the service area, and require help in activities of daily living.

Before PACE, people didn't have any other choice than to pay for expensive care or move into a nursing home. But now there's this other option where you can stay at home, come to our center, get physical therapy, coordinated medical care, and age gracefully in your home. There has been a change in the type of care we're able to provide at home. There really isn't anybody that we can't take care of at home.

My whole career has been taking care of geriatric patients. It's infinitely interesting and completely rewarding. I have a special love for this center because I grew up in Brooklyn. It's really special for me to be here, serving the people who raised me.



McGregor Announces that the PACE program will be coming soon to Lorain County in 2024 followed by expansion into Summit County in 2025.

It's great to hear that there is much anticipation for the expansion of the PACE program in Lorain County with programs aimed at enhancing the lives of older adults and the significant positive impact it will provide for communities. As part of the long awaited Expand PACE Ohio, this two-part senior care center and housing project is being realized in Elyria.

There's an Expand PACE Ohio logo on the pasteboard of the current Page 6, if you need it.

McGregor in the News...

A recognized leader in the industry

McGregor recognized by Newsweek: 2024 America's Best Continuing Care Retirement Communities

Today's senior citizens are more active than the generation before them. Consequently, senior housing options have changed to meet the expectations of these active retirees, with a wide variety of activities. From living independently to assisted living and skilled nursing, each facility offers comprehensive services, ensuring residents can age with dignity.

Residents, who almost always start at independent living, can transition between levels of care as their needs and health change without having to move to a different community. This continuity is desirable for a lot of seniors, but it can be costly. CCRCs, which are licensed at a state level, typically offer a payment option that covers life-care services.

For over 30 years, U.S. News & World Report has worked with leading providers of all health-related sectors, locations, and sizes to recognize those who provide the best care. The top-rated communities for each level of care have been rated Best Senior Living in their categories. These independent evaluations from a trusted source can help families make better decisions and have a more positive experience.

Newsweek has partnered with the respected global research firm Statista to rank America's Best Continuing Care Retirement Communities for the first time. This year, we are proud to award the leading 250 CCRCs in the United States—places where residents not only live but thrive. McGregor made the grade at number 167!



McGregor ranks #3 in America's Best Nursing Homes

Exciting news to share. Families across the nation entrust nursing homes with the health and dignity of their loved ones. Finding the right facility is not just about numbers; it's about ensuring your family member receives the care and attention they deserve.

We are proud to be recognized as one of the best in the category of 100-149 beds, Ohio. Congratulations to our dedicated One McGregor Team!

To support families as they consider their options, Newsweek has partnered with respected global data research firm Statista to create our third annual ranking of America's Best Nursing Homes. The rankings are based on five data sources, including performance data, peer recommendations, management of the COVID-19 situation and accreditations from The Joint Commission and Commission on Accreditation of Rehabilitation Facilities.

For the first time, resident satisfaction data for nursing homes, based on National Safety Goals from The Joint Commission and Google Scores, has been added to the scoring model.



McGregor Assisted Living awarded Excellence in Senior Living As recognized by Assisted Living Magazine

"Your outstanding standard of care and service, evaluated through online reviews, publications, and industry standards, sets you apart." Congratulations to the entire team for representing us so successfully and providing the compassionate care that our residents deserve.

Building a Strong Team of Leaders

McGregor celebrates Leadership Academy graduates 2022 and 2023

It's inspiring to witness colleagues who show such dedication, passion, and a drive for personal and professional growth within our organization.

The success of these graduates undoubtedly paves the way for future nominees, promising an even brighter future ahead.

Wishing all the best to those who are continuing their journey towards leadership excellence within our organization!



2022 graduates



2023 graduates



McGregor, a name Greater Clevelanders have lived by for 145 years.

The McGregor Foundation and CHN Housing Partners Celebrate the Grand Opening

106-Unit Affordable Housing Development for Seniors

Cleveland, September 7, 2023 – The McGregor Foundation (McGregor) and CHN Housing Partners (CHN) were joined by Cuyahoga County Council, Cheryl Stephens; Enterprise Community Partners, Jennifer Eppich, and other leaders to celebrate the grand opening of McGregor Independent Living, an initiative that will preserve 26 and create 80 new units of affordable housing on McGregor’s East Cleveland campus. Many of the McGregor Board members attended as well.

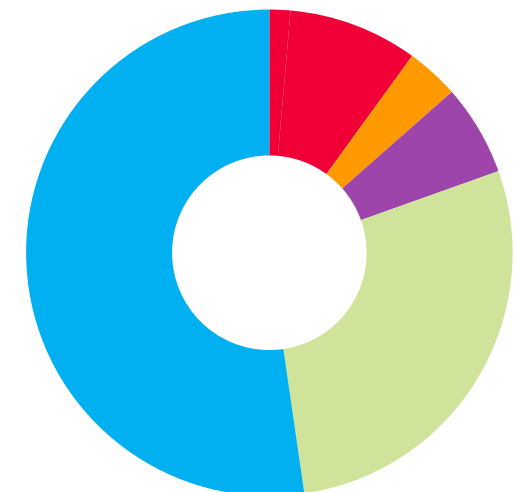
This project was one of only 18 in the nation awarded Section 202 financing in 2020 from the U.S. Department of Housing and Urban Development (HUD). HUD’s 202 program provides capital for the development of housing for low-income seniors and a commitment to pay operating costs that are not covered by tenant rental payments.

“McGregor is determined to improve the access of affordable options through advocacy and additional housing development with partnerships like this one,” said Ann Conn, president and CEO of McGregor.



Seniors served in 2023

● Independent Living Affordable	165
● Hospice	58
● Assisted Living	100
● Skilled Nursing	465
● PACE	864
Total	1,652



CULTURE describes
 “the way things work around here”

ENGAGEMENT describes
 “how people feel about the way things work around here.”

The BVC process unlocks and aligns individual and organizational potential.

Our approach to transformation starts with a clear understanding of where the organization is and where they want to go. The goal may be to be a great workplace, to build a high-performance team, or to be the best IN the world and best FOR the world. No matter the goal, our process results in strong alignment between culture, leadership, and strategy.

The Barrett Model is the breakthrough work of Richard

Barrett. Inspired by Abraham Maslow’s Hierarchy of Needs and tested over more than two decades of real-world experience with thousands of organizations, the model identifies the seven areas that comprise human motivations. These range from basic survival at one end, to service and concern for future generations at the other.

It provides a proven and extraordinarily useful map for understanding the values of your employees, leaders, and stakeholders. Even better, it offers a means for creating more supportive and productive relationships between them, and a deeper alignment of purpose across your organization.

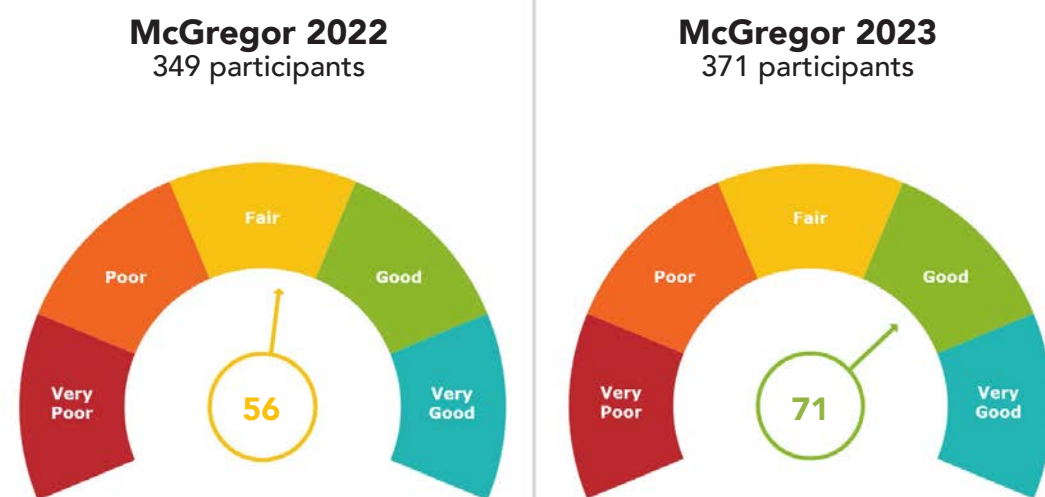
McGregor is working to become an employer which is known for its excellence, strong culture, learning environment and sense of belonging and its commitment to diversity, empowerment, equity, and inclusion. One strategy is to utilize the Barrett Values Centre assessment.

Culture Score Comparison

This is the benchmark metric reflecting the health and strength of a culture.

The score is based on matches, Cultural Entropy® and balance between the levels.

McGregor 2022 vs. McGregor 2023



Global Average: 51
Drive Average: 64

McGregor is making progress in this work and has made tremendous progress in 2023 moving from a score of 56 to 71 for overall culture score which is higher the Global average and the Drive average.



National Intern Day is a holiday that is celebrated each year on the last Thursday of July. This annual observance gives organizations around the country a special day to recognize and celebrate the future leaders of the world: interns!

We would like to take this opportunity to commemorate and thank our 2023 interns for the good work they’ve done this summer!

Funded by the McGregor Foundation, the McGregor Summer Internship Program provides college students with a view of the many facets of aging services and the multitude of careers that support the delivery of care to those in need, from health administration to marketing & communications, from finance & accounting to social work, and everything in between.

So, without further ado, let’s meet the interns who have learned, explored their areas of interest, and brought new ideas to the tables of their respective teams at McGregor this summer!

Gabrielle Carrara – Marketing and Communications Intern
 Gabrielle Carrara assisted our Chief Marketing Officer and our Director of Philanthropy in telling McGregor’s story this summer.

Gabrielle is a rising senior at Bowling Green State University, where she studies Marketing. Following her graduation in December, Gabrielle hopes to join the marketing team of an organization in the greater Cleveland area.

When asked about the value she gained from her internship at McGregor, Gabrielle said, “This internship has forced me to go outside of my comfort zone in order to learn new communication skills, research important topics, and write content that is useful and relevant for so many people.”

Gavin McCoy – Finance Intern

Gavin McCoy assisted our Chief Financial Officer with a variety of finance and accounting-related tasks this summer.

Gavin is about to enter his sophomore year at the University

of Cincinnati, where he studies Finance. After he graduates, Gavin hopes to own a financial advising firm of his own.

When asked about the value he gained from his internship at McGregor, Gavin said, “I’ve learned so much about taxes, payroll, management, and everything else that goes into owning and operating your own business, which is something that I hope to do someday.”

Ryan Eisenhuth – Marketing and Communications Assistant
 After working as a Marketing and Communications Intern last summer, Ryan Eisenhuth returned this summer as a Marketing and Communications Assistant to continue aiding our Chief Marketing Officer in telling McGregor’s story.

Ryan just graduated from Geneva College, where he studied Communication, Integrated Media Production, and Public Relations. In the fall, Ryan will begin pursuing a Ph.D. in the School of Communication Studies at Ohio University.

When asked about the value he gained from his internship at McGregor, Ryan said, “I love how my work at McGregor gives me the opportunity to share relevant and useful information – with a variety of audiences and through a variety of mediums – that will truly make a positive difference in the lives of older adults throughout our community.”

Some Places Are All About the Experiences...

...and McGregor is one of them. We are proud that our internship program has been such a great experience and has made such a big difference in the lives of our interns.

To our interns, thank you for choosing McGregor and for all your good work this summer. We wish you continued success as you finish school and begin pursuing new passions in the future!

Does our internship program sound like a good fit for you? Visit our Indeed page to apply for next year’s Summer Internship Program.



Five levels of care. One Place.

Assisted & Independent Living, Rehab, Skilled Nursing, Hospice, PACE

McGregor

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Everything you planned for and more!