

Care Planning Partners Inc.
About Us
firm background
planning partners inc.

OUR MISSION

We are committed to providing information and knowledge to empower providers-of care services and accommodation.

Care Planning Partners is a leader in the provision of market and financial consulting services to the residential retirement and long term care industries.

Our experience in this industry of over twenty-five years in communities across Canada has enabled us to become a preferred provider of professional services to major care home owners, operators, developers and lenders.

Our work includes over 2,000 studies across Canada and includes market studies for independent supportive and assisted living residences, seniors apartments and condominiums and life-lease projects.

Our clients include most major providers in Canada and the United States in both the public and private sector, for profit and charitable organizations:

Allegro/Maestro Residences, Amica Mature Lifestyles, Baybridge Senior Housing, Build Toronto, Classic Residences by Hyatt, Community Lifecare, Central Park Lodges (RRR), Chartwell Senior Housing REIT, Delmanor (Tridel), Diversicare (Verve), Extendicare, the Forrest Group, Gardens Retirement Developments, Hallman Terraces, International Care Management Services, Jarlette Health Care, Kingsway Arms, Leisureworld Inc. (Sienna), Masterpiece Inc., Oakwood Retirement Communities, Ontario Teachers Pension Plan, Omni Health, Regal Lifestyles, Revera, Reichmann Seniors' Housing, Schlegel Villages, Specialty Care, Seasons Retirement Communities, Spectrum Seniors Housing Development, Statesman Lifecare Centres, Sunrise Assisted Living, Tridel, Alterra Assisted Living (U.S.), Manorcare (U.S.), and others.

Not for profit clients include West Park, St. John's Rehabilitation, Arnprior, Durham and Huntsville Hospitals, the Good Samaritan Society (Alberta), Algonquin Health Centre, Belmont House, the Bennett Centre, St. Patrick's Home, the Rideau and Perley Veterans' Health Centre, Bruyere Continuing Care, Le Villageois de LaFontaine, Severn Falls Chapel Christian Housing Project, Trinity Village, Fairview Mennonite and the Alzheimer Society of Ottawa, Carleton and others.

Condominium studies include Belmont House, Toronto, Bennett Centre in Georgetown, West Park Hospital, Algonquin Health Centre, Hearthstone on the Lake in Burlington and Etobicoke, Collingwood and Port Hope, Milton, and Ron Schlegel's independent/supportive condominiums, part of Winston Park in Kitchener, among others.

Our approach to each assignment adheres to the highest standards of service excellence and embraces focussed research techniques, proven market assessment practices and sophisticated financial modelling. Our assessments are based by the most recent Statistics Canada age specific census and other data. Our analysis process ensures that all factors likely to impact the success of a particular operation are fully examined and understood.

CONSULTING

Market and Financial Feasibility Assessments

The market and financial feasibility process for care facilities requires a critical assessment of the market area and its particular supply and demand characteristics, health care dynamics, demographics, economics and development trends. A thorough knowledge of the facility requirements, both from a regulatory perspective and from the perspective of the senior, seasoned by twenty-five years of experience, result in a solid market feasibility assessment.

Our experience in overseeing the operations of care facilities and in working with operators, coupled with our market knowledge and sophisticated projection models ensures a thorough financial feasibility.

We do not own or manage any facilities and are therefore able to maintain the independence and objectivity required in the feasibility process.

Operational and Financial Diligence Reviews

Care Planning Partners has conducted a number of operational, market and marketing reviews for both lenders and owners in the care industry to enhance the ultimate viability and value of the homes and has advised clients and provided due diligence support in the acquisition of care facilities.

Working closely with financial, legal, accounting and tax professionals, Care Planning Partners provides efficient and cost effective financial consulting. Our consultants have successfully undertaken numerous assignments including financial structuring and analysis as part of a Limited Partnership Offering for an Intermediate Care facility in British Columbia and a number of retirement facilities in Ontario.

We assisted in the financial restructuring including detailed tax reporting to limited partners in a condominium project and prepared sales marketing packages.

Expert Witness

Care Planning Partners has provided "expert witness" submissions for a number of residential retirement projects and has made submissions at several Municipal Board hearings.

Prospectus Support

Care Planning has provided Prospectus support to Chartwell Senior Housing REIT, Leisureworld and Regal Lifestyles in market reviews of the buildings comprising the portfolio, industry trends and future demand projections.

Concentration Studies

Working with legal advisors, Care Planning has completed market analysis for the Competition Bureau on several major sales transactions in the senior housing space - Chartwell's Maestro acquisition, Revera's sale to the Health Care REIT and Leisureworld's acquisition of Specialty Care among others.

THE PROFESSIONAL STAFF

Fred Schleich, C.A., President

Fred formed Care Planning Partners in the fall of 1993 after having consulted to the care industry since 1990. A thorough knowledge of the residential retirement market and of the market and financial feasibility process, coupled with a strong financial background and a clear understanding of the development process, enables him to bring a wide spectrum of experience to clients.

Fred is a Chartered Accountant having obtained his professional designation with Coopers & Lybrand (now PriceWaterhouseCoopers) and is a graduate of the University of Toronto with a Bachelor of Science degree. Fred was employed as a professional by Coopers & Lybrand for a period of ten years, largely in the accounting and auditing practice, specializing in financial services, real estate and insurance, with experience in hospitals, having audited Sunnybrook Hospital.

He left the firm to join Walwyn Stodgell Cochran Murray Limited, the first Canadian Investment dealer to go public, where he was Senior Vice President, Treasurer and Director and was a member of the management committee. With responsibility for financial reporting, treasury, human resources, office services and the client service departments for the firm's premier investment account and for its tax products. He was responsible for several mergers, acquisitions and divestitures and in taking the company public. With a strong background in systems and procedures, he was instrumental in starting the systems and internal audit departments and in the design of the systems relating to the firm's Asset Management Account and Self Invested RRSP Account, both the first of their kind in Canada.

Fred served as President and a Director of The White Light Hospice Foundation (1991 to 1999), a charitable foundation dedicated to establishing a free standing in-patient hospice for terminally ill cancer patients, and as president was instrumental in starting a respite and day care hospice centre.

For more information about us or any of our services, please contact us:

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Care Planning Partners Inc. is a member of the Ontario Retirement Communities Association, Ontario Long Term Care Association, Advantage (Ontario Association of Non-Profit Homes and Services for Seniors)