



LeadingAge Georgia is partnering with Mauldin & Jenkins, LLC for the 5th edition of a HUD benchmarking study [available for ALL HUD housing communities located throughout the state of Georgia](#). You do not have to be a member of LeadingAge Georgia to participate. This survey has been designed due to a number of requests for this information from a number HUD housing communities.

The study will focus on the items:

- Average salaries by position
- Revenue and expense analysis
- Occupancy
- Cash reserves

**\*\*DEADLINE: Thursday, August 30, 2018 \*\***

To be included in and receive the complementary results of this survey, it must be completed by Thursday, August 30, 2018. The survey should take approximately 15 minutes to complete. The results of the information gathered will allow HUD entities throughout the state of Georgia to compare their performance and other items to other entities in a similar geographical region. This information can be critical to planning and budgeting for future needs.

NOTE: Regarding Staff roles for salary information: Staff with similar roles have a variety of titles in HUD communities. Please review the job description for each position and choose the one that best describes the similar role in your organization. Please note that the data should include information that is effective as of March 1, 2018.

We encourage your participation so the results of this survey will be more valuable with a higher number of participants. All information provided will remain private. The survey results will be free and emailed to all organizations that participate once it is complete.

Thank you for taking the time to participate.

Lastly: For your convenience, we will send a second email with a PDF version of the full survey so you can review the content ahead of time.

For more information, visit, [www.LeadingAgeGA.org](http://www.LeadingAgeGA.org). For membership information, see "Member Benefits" under the MEMBERS tab and contact Ginny Helms at [ghelms@LeadingAgeGA.org](mailto:ghelms@LeadingAgeGA.org) or (404-872-9191).

Contact us for more information about our Dementia & Mental Health Symposium on September 14th. Link to registration: <http://institute.leadingagega.org/calendar.html#id=452&wid=301&cid=247>

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1. Name of Property

2. Contact Person for Property

3. Email Address

4. County of Property

5. Property Management (choose which applies)

Self-managed

Third Party

□

□

6. Please respond to the following questions using numerical text only. (i.e. 1, 10.2)

Age of building(s) (in years)

Square footage of building(s)

Occupancy percentage

Number of Assisted Living Units

Number of Nursing Care Units

Number of Independent Care Units

Number of studio apartments

Number of 1 bedroom apartments

Number of 2 bedroom apartments

Number of 3+ bedroom apartments

What was the increase in monthly rental per unit fees in the last year?

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7. Please input the financial information from the Statement of Financial Position, Statement of Activities and Statement of Cash Flows from audit report. (i.e. \$1, \$10)

1320 Cash, Replacement Reserve

1400T Total Property and Equipment

8. Replacement reserve deposit suspended or waived? Yes or No

Yes

No

9. Please input the financial information from the Statement of Financial Position, Statement of Activities and Statement of Cash Flows from audit report. (i.e. \$1, \$10)

5000T Total Revenue

6263T Total Administrative Expenses

6400T Total Utilities Expense

6500T Total Operating and Maintenance Expense

6723 Health Insurance and Other Employee Benefits

6700T Total Taxes and Insurance

6800T Total Financial Expense

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10. ACTIVITIES COORDINATOR

Job Description- Plans, organizes, and directs activities program, which is responsive to the needs and requests of the residents within budget and philosophy. Prepares a monthly calendar of events. May also supervise volunteers.

Annual Expense

# of Employees

11. ADMINISTRATIVE ASSISTANT / SECRETARY

Job Description- Provides administrative and clerical support for a department or managerial staff. Word processing, computer and basic spreadsheet skills are used. May also provide leadership to various projects, etc.

Annual Expense

# of Employees

12. ADMINISTRATOR / PROPERTY MANAGER

Job Description- Oversees all operations including supervision of all programs and staff for the property. Does not report to the governing body or board.

Annual Expense

# of Employees

13. ADMISSIONS / MARKETING

Job Description- Coordinates the application and admission process. Advises resident-applicants of admission procedures, financial obligations and assists resident-applicants with documentation. Maintains file of applicants. May involve providing information to potential residents including community tours as well as reaching out to the community at large to market the organization.

Annual Expense

# of Employees

14. ASSISTANT ADMINISTRATOR / VARIOUS ROLES

Job Description- Assists Administrator. Assumes all duties and responsibilities of Administrator in his/her absence. May have certain responsibilities tied to regulatory compliance or financial duties that can vary.

Annual Expense

# of Employees

15. DIRECTOR OF DEVELOPMENT

Job Description- Responsible for the fundraising and gift cultivation of the organization, and may promote public relations between the facility and supporting churches, agencies, and the community.

Annual Expense

# of Employees

16. DIRECTOR / ADMINISTRATOR OF ASSISTED LIVING / PERSONAL CARE

Job Description- Administers, directs, and coordinates all activities related to the Personal Care Home (or Assisted Living Community), including regulatory compliance, admissions, supervision of staff, community outreach, etc.

Annual Expense

# of Employees

17. DIRECTOR OF DIETARY / FOOD SERVICE

Job Description- Administers and supervises the designed food preparation and food service operations.

Annual Expense

# of Employees

18. DIRECTOR OF FINANCE / BUSINESS SERVICES / OPERATIONS

Job Description- Responsible for financial management of the corporation. May include supervision of recording and reporting of financial data and the bidding and purchasing of materials, supplies, and equipment. Position may include other aspects of business management and operations.

Annual Expense

# of Employees

19. DIRECTOR OF MAINTENANCE / MAINTENANCE SUPERVISOR

Job Description- Plans, schedules, and supervises maintenance and repair work of buildings and utilities systems. Supervises and assigns maintenance staff to specific jobs and spot checks work to ensure that workmanship meets standards and that safety and building regulations are in compliance.

Annual Expense

# of Employees

20. DIRECTOR OF SOCIAL SERVICES / SUPPORTIVE SERVICES

Job Description- Responsible for managing the Social/Supportive Services program, providing direction and development of the department. Manages service coordinators and maintains relationships with outside providers working in the building.

Annual Expense

# of Employees

21. EXECUTIVE DIRECTOR / CEO/ PRESIDENT (multi-site/corporate)

Job Description- Responsible for the oversight of more than one property. Reports to and attends meetings with the governing body or board regarding the total activities of the corporation as well as regulatory compliance.

Annual Expense

# of Employees

22. EXECUTIVE DIRECTOR / CEO/ PRESIDENT (single site)

Job Description- Responsible for the oversight of one property. Reports to and attends meetings with the governing body or board regarding the total activities of the corporation as well as regulatory compliance.

Annual Expense

# of Employees

23. GENERAL MAINTENANCE/ MAINTENANCE TECH

Job Description- This position includes a variety of general maintenance duties not performed by a skilled maintenance worker.

Annual Expense

# of Employees

24. HOUSEKEEPER

Job Description- General housekeeping responsibilities including Cleaning and waxing furniture, fixtures, lavatories and replacing supplies.

Annual Expense

# of Employees

25. OCCUPANCY SPECIALIST

Job Description- Responsible for the oversight and administrative processing of resident applications and assures that all federal, state and local guidelines of HUD and/or DCA are adhered to (including fair housing practices).

Annual Expense

# of Employees

26. RECEPTIONIST / FRONT DESK

Job Description- Responsible for answering the phone, administrative assistant duties, monitoring call systems, and liaison between residents, visitors, and operations of the community.

Annual Expense

# of Employees

27. SERVICE COORDINATOR

Job Description- Responsible for coordinating and linking residents to needed services that will assist them to age in place successfully. Provides information and make appropriate referrals to residents/families in all areas of case management.

Annual Expense

# of Employees

28. SENIOR MAINTENANCE / SKILLED MAINTENANCE

Job Description- This position includes a variety of skilled duties, including plumbing, masonry, carpentry, painting, HVAC, electrical work, refrigeration, etc.

Annual Expense

# of Employees

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29. Additional Suggestions/Comments

30. What suggestions would you like to see made in next year's survey?