

Session 1 — Go / No-Go: Are You Really Ready for Your Next AFH Project?

Use this worksheet during the webinar. Mark honestly: “Not sure” counts as risk. Your goal is to convert one high-impact “No/Not sure” into a “Yes” within 30 days.

Provider/Company:

Today’s Date:

Project type (check):

2nd/3rd home

Remodel/Upgrade

Expansion (6→8)

CHOW

A) Readiness Scorecard

Mark each line. Then tally your result at the end.

Category	Readiness prompt	Yes	No	Not sure
Care model	I can clearly describe the residents we serve (acuity/needs) and how staffing supports them.			
Care model	Our care model matches our growth goal (payer mix, acuity profile, staffing reality).			
Financial	I have a 12–24 month view of ramp-up + cash flow (including delayed opening risk).			
Financial	I have reserves/contingency for delays and unknown scope (not just “best case”).			
Financial	My lender expectations are aligned with ramp-up and draw timing (no surprises).			
Strategy	I know which growth path we are taking (convert / buy-to-convert / CHOW / ground-up) and why.			
Strategy	I have a “stop/go” trigger (what would make me walk away before spending more).			
Property	I can screen a property for AFH suitability (beds/baths, circulation, access, parking, neighbors/HOA).			
Property	I understand the likely life-safety/accessibility scope drivers (exits, bathrooms, stairs, sprinklers).			
Team/process	I know what to ask an architect and GC to verify they run a predictable process.			
Team/process	We have a communication rhythm: weekly check-ins, decision list, and change control.			
Team/process	We will do feasibility/constraints review before committing to major scope or removing contingencies.			

Score interpretation

Go: Mostly Yes (0–2 No/Not sure). Go-with-conditions: 3–5 No/Not sure — proceed only after conditions are resolved. No-Go-for-now: 6+ No/Not sure — convert unknowns to knowns before committing.

B) 30-Day Conversion Plan

Pick ONE high-impact “No/Not sure” and convert it to a “Yes” within 30 days.

My one “No/Not sure” I’m converting	
What must be true for it to become “Yes”	
Who I need to talk to (name + role)	
What I will do in the next 7 days	
What “done” looks like (proof)	
Deadline (date)	

Educational only; not legal, financial, or regulatory advice. Confirm requirements with your local jurisdiction and licensing contacts.

C) Next 3 Conversations

Use these questions verbatim. The goal is to surface assumptions early and reduce schedule + budget surprises.

Conversation 1 — Your lender

Goal: confirm underwriting assumptions and funding/draw realities.

	Question / prompt	Notes
	What assumptions are you underwriting for census ramp-up and staffing costs?	
	What conditions typically delay closing or loan draws on projects like this?	
	What makes a 'strong file' for this project type (documents, timing, contingencies)?	
	If permitting or construction slips 30–60 days, what happens to the loan terms or timeline?	

Conversation 2 — Licensing support + AHJ alignment

Goal: identify regulatory and inspection constraints early (before design-by-assumption).

	Question / prompt	Notes
	What constraints must be true for approval (exits, windows, bathrooms, accessibility)?	
	Which items most often trigger re-inspections or late redesign?	
	What should be verified while we still have contingencies / before major spending?	
	What documentation do you want to see early to avoid surprises later?	

Conversation 3 — Architect + GC (Predictability Questions)

Goal: verify the team has a process that makes scope, cost, and schedule predictable.

	Question / prompt	Notes
	How do you surface licensing/life-safety impacts early—before drawings are ‘done’?	
	How do you keep cost visible during design (checkpoints, estimating approach, assumptions)?	
	How do you model schedule beyond construction (permits, inspections, licensing)?	
	How do you handle change orders transparently (rules, approvals, documentation)?	
	How will you protect residents and staff if we are remodeling an occupied home?	
	What do you need from me—and by when—to keep this moving predictably?	

Notes / parking lot

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