Andertuffel, Walter "Tuffy"

To: Data Science Team   Fall 2020

Subject: Horizon View Properties project

Dear Data Science Team,

Our Executive team is looking to get your help over the next 6 weeks on a presentation we're preparing for the Board later this year. The Board has asked us to present our recommendations to them on a list of geographical areas that would be best for us to consider growing our presence in by opening up new facilities in those locations during the next 5 years.

As you may remember from last month's Corporate All-Hands, our top focus for the next 5 years is to become the premier retirement housing community in the country for the more affluent segment of the baby-boomer retirees. A key to achieve that vision is to expand our reach beyond the Southern California area into other cities or towns in the country that would have a high potential for us to grow our resident base in.

Our Finance and Real Estate Development teams are also working on this from their perspective but we're hoping that as our new Data Science Team, you'd be able to offer a unique data-driven focused perspective. In particular, we're hoping your team can bring a more scientific approach to mining and making sense from the many sources of data we believe are available out there.

A few key ideas that have come up in discussions among the executive team include the following... but these are not the only factors that should be considered:
· Trends and shifts in demographics
· Quality of Healthcare
· Weather
· Affordability/Cost of Living
· Recreation options
· Amenities
· etc...

Two specific outcomes we have that we think your team is well positioned to address are:

1. Categorize all the different geographical regions into 5-10 groups. It would be ideal if these groups had an easy-to-describe interpretation.

2. Secondly, we want to present to the Board some type of "score" that quantifies the desirability or potential for each of these areas.

We think these two outcomes could greatly help us present to the Board a simple but yet a statistically sophisticated view of the various geographical areas allowing us to easily compare/contrast them, and potentially even help us identify areas that are unique opportunities worth considering.

<u>We'd like your team to present your work to myself and the Exec Team the week of</u> **October 26 - Nov 1, 2020**. *Note*: We plan on doing another few iterations of work in preparation for the board meeting, so it's not necessary that this first iteration of work be completely exhaustive... More important that we make some good progress by **October 26, 2020**. We'd also like to learn in that presentation how you think data science can help us by laying out some recommended next steps and other ideas you have on how we can best leverage data and data science tools on this initiative.

Between now and then, please schedule a weekly meeting with Kevin Potcner – our VP of Business Development to help keep this iteration of your work focused.

Thanks in advance for your help and if you have any questions please reach out to Kevin.

Regards,
Walter "Tuffy" Andertuffel
CEO, Horizon View Properties