

2024 Trilogy Corporate Responsibility Program Summary



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Our APPROACH



TRILOGY COMPANY OVERVIEW

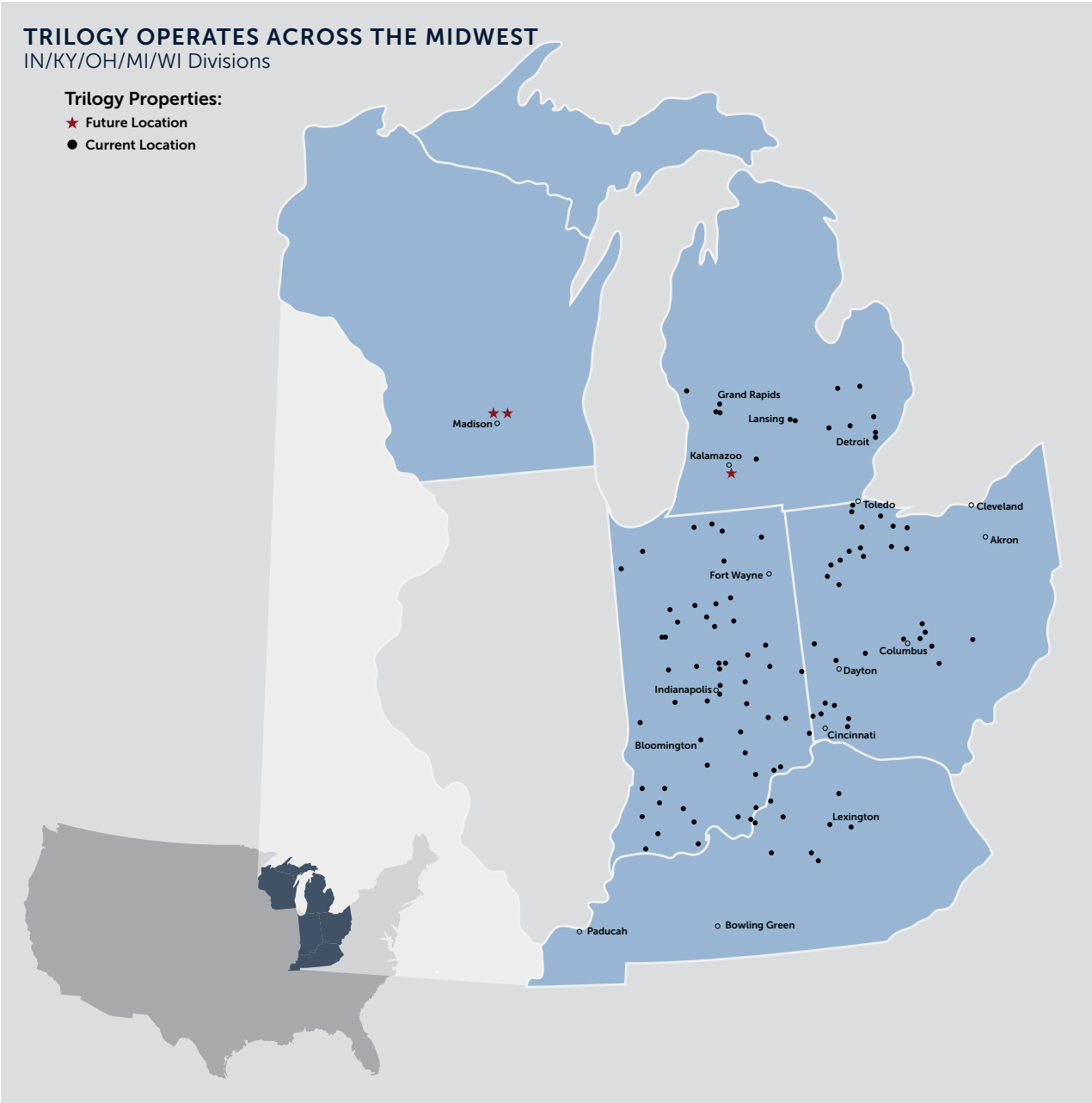
Trilogy is a leading senior living and health care company on a journey to be the Best Healthcare Company in the Midwest. Our company offers a full continuum of care, including Independent Living, Assisted Living, Personal Care, Memory Care and Post-Acute Healthcare Services. We deliver award-winning customer service and high-quality care to our residents and believe incorporating ethical business practices across our properties will create long-term value for our residents, customers, employees, communities and investors.

Trilogy portfolio companies

130+ senior living and skilled nursing communities

12,000 residents across five states

17,400 employees across 15 states





OUR PORTFOLIO OF CAMPUSES

The Trilogy portfolio of campuses is headquartered in Louisville, Kentucky and includes over 130 senior living and skilled nursing communities across five states including Kentucky, Indiana, Ohio, Michigan and Wisconsin. Trilogy serves over 12,000 residents and has over 17,400 employees operating in over 15 states. The Trilogy-owned ancillary provider, Synchrony, also provides post-acute care, including rehabilitation and pharmacies.

As part of Trilogy’s commitment to supporting our employees and our surrounding communities, the Trilogy Health Services Foundation was established. The mission of the Trilogy Health Services Foundation is to improve the lives of our employees so they may reach their full potential through education, financial stability and healthy living, which creates memorable moments for our residents. Over 65% of Trilogy employees donate to the Foundation through payroll deduction. In 2024, the Foundation provided support to nearly 10% of the Trilogy workforce through emergency assistance, scholarships, first-time home buyer grants and food security contributions.

SELECTED AWARDS AND RECOGNITION

- **Great Place to Work:** 86% of employees said Trilogy is a Great Place to Work in 2024
- **Healthiest Employers:**

2024 Results	
Ohio	7th
Indiana	4th
Kentucky	3rd
Wisconsin	2nd

- **AHCA Quality Campuses:** 103 Campuses honored with Bronze and 26 with Silver status as of 2024



2024
GREAT PLACE TO WORK
One of the best workplaces in aging services



2024
AHCA QUALITY CAMPUSES
103 Campuses honored with Bronze or Silver as of 2024



2024
RECOGNIZED BY U.S. NEWS & WORLD REPORT
48 Campuses named to U.S. News & World Report's Best Nursing Homes for 2025

NET PROMOTER SCORE: 94% among employees!



OUR CORPORATE RESPONSIBILITY APPROACH



Our approach to corporate responsibility is guided by our enterprise strategy, the ‘Flywheel to Success.’ At each step of the Flywheel, we consider ways to support our stakeholders, address our impact on the environment and create long-term value for the business. We will continue to identify ways to integrate corporate responsibility into our ‘Flywheel to Success.’

OUR FLYWHEEL TO SUCCESS

At Trilogy, our people are the heart of everything we do, which is why they sit at the top of our Flywheel to Success. Each aspect of this Flywheel aligns with our strategic vision and serves as a guide for our leadership team. When we invest in our employees and create an exceptional experience for them, they, in turn, deliver outstanding care and experiences for our customers. Getting this right leads to growth and success for the company.

At our core, Trilogy is built on a servant leadership mindset. We are committed to serving one another and serving up, ensuring that we all have what we need to thrive.

Our vision to cultivate “the Best Place You’ve Ever Belonged” and our dedication to culture are fundamental to who we are and set us apart in the industry. A strong foundation of belonging not only helps us hire the right people but also empowers them to reach their career aspirations.

Setting the Gold Standard of Clinical Excellence has always been a key part of our strategic vision. This focus has differentiated us in the industry, much like our Trilogy Service Standards, which have elevated our customer experience for the past 18 years, even as expectations have evolved.

A commitment to continuous improvement is also a critical element of our Flywheel. We encourage curiosity, embrace outside-in thinking, challenge assumptions and always strive to stimulate progress. This mindset helps us maintain excellence in our operations and ensures we’re constantly evolving.

By prioritizing these principles, we’ve been fortunate to attract and retain customers. Growing occupancy is essential to our success, and being strategic in how we approach this is key to sustained business growth.

All of these elements work together to propel our success, much like the motion of a Flywheel. We operate with an Earnings Last on Purpose mindset: While earnings are a crucial component, we know that if we excel in all these areas, the earnings will naturally follow, enabling us to reinvest in our people and business.



The Board of Directors of Trilogy Health Services' parent company (the "Board of Directors") is responsible for overseeing our corporate responsibility strategy and performance. In 2024, we established a Corporate Responsibility Committee that is responsible for providing oversight and guidance on the development and implementation of our corporate responsibility initiatives. The Corporate Responsibility Committee meets regularly and is composed of cross-functional leaders across the organization from Talent, Communications, Legal, Financial Reporting, Facilities, Compliance, Internal Audit and Risk functions. Our Chief Legal Officer serves as the executive sponsor of the Corporate Responsibility Committee and our AVP of Financial Reporting serves as the leader of the Corporate Responsibility Committee. Subcommittees of the Corporate Responsibility Committee may be formed in the future to advance progress on specific topics as needed.

We are in the process of further formalizing the Corporate Responsibility Committee roles and responsibilities over the next year, including reviewing corporate responsibility disclosures, developing a baseline for metrics, overseeing a consistent approach for tracking data and understanding our corporate responsibility risks and opportunities.

TRILOGY INVESTOR'S BOARD OF DIRECTORS



Danny Prosky



Gabe Willbite



Leigh Ann Barney



Ray Oborn



Our **RESPONSIBILITIES**



We work to strengthen the commitments that we hold to our residents, employees and community members through the exceptional services we offer, philanthropic efforts in the community and continuing to be a great place to work for all our employees.

THRIVING AT TRILOGY: TOTAL WELL-BEING

The Thrive framework is built on four dimensions of total well-being: Vitality, Security, Connection and Growth. The Thrive@Trilogy framework provides and promotes programs to:

- **Find Vitality** to enjoy your health to the fullest

With comprehensive health coverage, preventive care and programs for emotional well-being, maternity support, weight management, becoming nicotine free and more

- **Find Security** to feel supported in your work and life

Through competitive compensation and unique pay programs, generous paid time off and a 401(k) savings plan

- **Find Connection** to live with purpose and believe you belong

Including business resource groups, recognition programs and opportunities to connect with our shared values

- **Find Growth** to reach your full potential

From registered apprenticeships to mentoring programs and leadership development

VITALITY

Trilogy is proud to cultivate a healthy and active workplace for our employees. We routinely rank among the top companies within the Healthiest Employers award program. We take a holistic approach to our employees' well-being through programs that increase awareness, literacy and engagement that supports each person's unique journey to well-being. Trilogy supports our employees' well-being through a number of health initiatives, including Hinge Health physical therapy, and engages with our employees on health-related topics through Personify Health.

One of our most successful well-being programs at Trilogy is Virta, a program that aims to prevent and manage diabetes by reducing medication dependence and supporting weight loss. Trilogy members who participated saw a 48% reduction in medication needs and 63% of participants with type 2 diabetes achieved significant weight loss.



Personify Health program

In 2024, 62% of Trilogy employees were enrolled in the Personify Health program with an average monthly engagement rate of 45%. Program participants realized significant benefits including a 53% lower attrition rate compared to non-participants. In addition, since joining the Personify Health program, employees have improved their health in remarkable ways, including 61% of high-risk, hypertensive participants successfully reducing their blood pressure, 57% of high-risk, obese participants achieving weight loss and 71% of high-risk, inactive participants increasing their activity levels.





SECURITY

In addition to well-being initiatives, Trilogy supports employee satisfaction through our comprehensive benefits packages that include health insurance, paid parental leave, options for Health Spending Account (HSA) and Lifestyle Spending Account (LSA) funds and a myriad of other benefits designed to enable our teams to be independent, stable in the short and long term and flourishing. Our competitive pay and incentives equip our teams to be at their best and help drive retention.



CONNECTION

Trilogy seeks to foster a sense of belonging for all our employees and has several initiatives focused on maintaining an inclusive culture and equal opportunities for all. This supports our vision to become “the Best Place You’ve Ever Belonged” for both our employees and our residents. Recent surveys from October 2024 showed that 87% of Trilogy employees feel like they can be themselves at work.



As part of our vision to create an inclusive workplace, we launched business resource groups (BRGs) recently and have continued to see participation in these business resource groups grow. BRGs at Trilogy provide opportunities for our employees to collaborate, celebrate and learn together. We will continue to invest in these programs moving forward and support employee participation. Our business resource groups are open to all and currently have over 400 participants across the organization.

Additionally, Trilogy provides avenues to connect with our greater communities and shared values, including partnerships with the Alzheimer’s Association and Metro United Way. The Foundation serves not only our employees and residents, but also the communities where we work. The Trilogy Health Services External Scholarship Program supports early collegiate students who are interested in pursuing a career in health care with a focus on senior populations. We are committed to investing in the next generation of health care leaders and increasing access to career opportunities in the health care industry.

Trilogy Health Services Foundation

- Foundation Donations: The Foundation has committed to donating **\$25,000 a year for the next four years to Jefferson County Public Schools** for HOSA – Future Health Professions, formerly known as Health Occupations Students of America (HOSA) dues, travel for competitions and food for students/faculty related to HOSA activities.
- In 2024, the Foundation committed **\$25,000 to Catholic Charities’ Common Table program** which works to provide training for culinary jobs to those who face barriers to employment. The program has an **81% job placement rate**.
- The Foundation donated **\$25,000 to YouthBuild Louisville’s CNA Nursing program** which supports underserved populations in their education to become Certified Nursing Assistants.



GROWTH

At Trilogy, we work to ensure that we are creating a culture that attracts committed people who share our values and that our employees are empowered to grow in their career and beyond. Programs that foster professional development, such as Trilogy's Apprenticeship and Mentorship programs, leadership training and higher education opportunities ensure we are supporting our teams throughout each stage of their career journey, including a "blue badge period the first 6 months" designed to ensure newly-hired employees receive the support they need from tenured team members.



Career Pathways: Registered Apprenticeship Program

Trilogy Career Pathways encompasses our career development programs including scholarships, tuition reimbursement, mentorship opportunities and our largest program, the Registered Apprenticeship Program (RAP).

This program assists employees in pursuing certifications leading directly to promotions and wage increases. In 2024, 2,800 employees were actively enrolled in the RAP program and 141 registered apprentices successfully achieved journey work status by completing their registered apprenticeship. Employees can choose from Life Enrichment, Hospitality, Culinary, Environmental, Business Office and Certified Nursing Assistant (CNA) Apprenticeship Programs.



Trilogy Health Services Foundation

The mission of the Trilogy Health Services Foundation is to improve the lives of our employees by providing tools that support their education, financial stability, and foster a healthy lifestyle. Our vision is to provide resources for our employees and residents to take them well into the future.

In 2024 we assisted over 1,730 employees, nearly 10% of the workforce, through emergency assistance, scholarships, and grants for first-time home buyers. Foundation accomplishments include:

- **Emergency assistance:** The emergency assistance program strives to assist our employees during times of emergency. Emergency assistance is available to employees on campuses or at offices who meet the need-based financial qualifications. The Foundation grants award up to \$2,000 for items such as car repair, food assistance, house repairs, medical emergencies, and loss of property.
- **Scholarships:** In 2024, the Foundation provided scholarships to 284 Trilogy Health Services and Synchrony Health Services employees or dependents for \$199,250.
- **Careself:** Food pantries are available to employees at every Trilogy location. In 2024, the Foundation provided \$442,910 to fight food insecurity.
- **Susan's Saving:** Susan's Savings First Time Home Buyers Program helps employees purchase their first home by creating a savings plan and matching funds up to \$2,000 at closing. In 2024, the Foundation assisted seven people for a total of \$14,000.

RESIDENT SATISFACTION

Trilogy is committed to the well-being of our residents through life enrichment and customer experience programs. We seek to deliver a new standard of memory care through cutting-edge research and best-in-class training for memory care professionals.



Live A Dream story

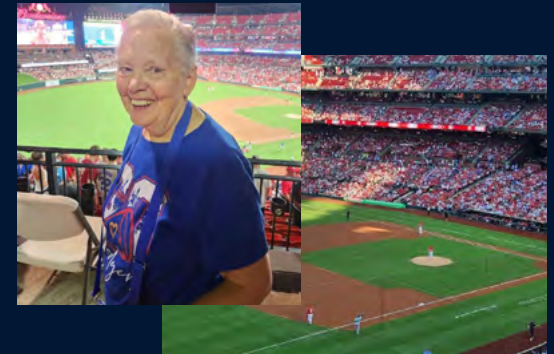
Trilogy helps seniors fulfill their lifelong dreams or revisit past activities through the 'Live a Dream' program. Each year, Trilogy funds and organizes activities to fulfill these dreams. In 2024, we facilitated 108 Bucket List Dreams and 1,069 campus-level dreams.

Live A Dream story #1:

Isabella was able to visit the athlete's Hall of Fame at the University of Miami, where her achievements are showcased. She was invited to participate in the 10th Annual Women's Athletic Dinner, where she was recognized as a pioneer in women's athletics. She served as the first Women's Athletic Director at the University of Miami, a role in which she played a crucial part in the institution becoming the first school to offer athletic scholarships for women under Title IX. Under her leadership, the University of Miami has set a precedent in supporting female athletes. Her contributions serve as a profound inspiration to women athletes across the globe.

Live A Dream story #2:

Sondra's dream was to attend a Dodgers game. As part of our Live a Dream program, she was able to not only see a game, but to experience the thrill of a seeing the Dodgers win on home turf.





Trilogy is committed to reducing our environmental footprint at our campuses and in the communities where we work. We aim to treat the environment with the same compassion that we show one another to create a better world. Our environmental priorities include energy efficiency, waste management and water conservation. We are in the process of conducting a baseline assessment across these areas to understand our usage and identify opportunities to reduce our environmental impact and make our facilities more resilient.

As part of our efforts to safeguard the health of our residents and employees, we have expanded the Trilogy SHIELD program across all our campuses, which uses digitally enabled technology to quantify cleanliness and identify improvement areas. Using UV-C light, we eliminate surface and airborne pathogens using a proactive approach to identify areas where additional disinfection is needed and have established long-term disinfection protocols. We have also expanded ATP testing and monitoring to assess the effectiveness of our cleaning protocols and enhance the safety of residents and staff across our communities. Our campuses are testing surfaces regularly and have achieved a pass rate of over 90%, exceeding the industry standard. In 2025, we will implement comprehensive testing across our communities.

We will continue leveraging cutting edge infection control mechanisms to strengthen our ability to monitor the environmental cleanliness of our facilities without compromising our commitment to quality.

ENERGY

Across all campuses, we utilize a third-party data collection system to analyze our energy data and understand our energy usage. In 2024, we established a baseline of our energy consumption to inform our first Greenhouse Gas Inventory.

As part of our ongoing efforts to improve energy efficiency, we look for opportunities to replace mechanical equipment for more efficient options. For example, we have undertaken a program to replace boilers at the end of life with improved energy efficiency designs. Eleven boiler conversion and 13 rooftop unit upgrades were completed in 2024. We also consistently work to educate our campuses on methods to conserve energy.

WASTE

We use a regional broker to collect all waste and support the diversion of 10% of our waste to recycling instead of landfills.

WATER

Trilogy uses smart irrigation systems and in 2024, Trilogy began performing pilots of watering conservation programs at select campuses. Moving forward in 2025, we will begin to pilot additional water reduction initiatives, including implementing more efficient systems for toilets across our campuses.

VISION FOR ENVIRONMENTAL RESPONSIBILITY

We are committed to continuously improving our environmental performance and reporting the progress of our environmental initiatives. In the future, we plan to further formalize and improve our environmental initiatives. We also believe that fostering a culture of environmental responsibility among our employees is crucial and we will continue to encourage their participation in our environmental initiatives.

We are in the process of conducting a baseline assessment across key environmental areas to better understand our usage and identify opportunities to reduce our impact. We are dedicated to enhancing energy efficiency across all operations, continuously seeking initiatives to reduce energy consumption. Our aspirations include reducing waste generation and focusing on our recycling efforts by increasing the amount of waste diverted from landfills. We also plan to reduce water consumption through the adoption of water-efficient technologies and practices in our operations in addition to the pilot programs already being implemented across our campuses.





We recognize that strong corporate governance is fundamental to achieving our strategic objectives and maintaining the trust of our stakeholders. Our culture of compliance and strong control environment encourage accountability, transparency and ethical conduct throughout the organization. The Board of Directors is committed to upholding the highest standards of governance and is responsible for overseeing the company's strategic direction, risk management and overall performance.



ETHICS AND COMPLIANCE

Ethical business conduct and compliance with laws and regulations are cornerstones of our corporate culture. We are committed to conducting our business with integrity and in accordance with all applicable laws and regulations. Our government affairs team monitors local, state and federal regulations that may impact our business such as regulatory changes related to long-term care and employment.

We recently updated our Code of Conduct that outlines the standards expected of all employees and we include the review of our Code of Conduct in our annual compliance training to ensure that our team understands and adheres to these standards. The Compliance department reviews the Code of Conduct every year. The Trilogy employee Code of Conduct serves as our guiding light on ethical, respectful business. It outlines the principles, values and behavior expectations that our team members are expected to uphold, fostering an environment of mutual respect, inclusivity and integrity.

We have established a third-party independently managed hotline system that encourages anyone, including employees, residents, vendors and campuses, to report unethical behavior or violations of laws or our Code of Conduct without fear of retaliation. The hotline system can be reached by either phone or website and all reporters have the option to remain anonymous. Our Compliance department is responsible for collecting and providing reports to relevant functions for investigation.

RISK MANAGEMENT

We adhere to best practices in corporate governance, including comprehensive risk assessments, an independent Compliance function to maintain integrity of audits performed, monitoring of regulatory changes at all levels and the establishment of various committees (e.g., Compliance) to enhance oversight and decision-making processes.

We have implemented a comprehensive risk management program that identifies, assesses and mitigates risks across all areas of our business. We conduct comprehensive risk assessments in each department and provide department-specific heat maps annually. Additionally, we have established a robust internal control system to monitor and manage risks proactively. By understanding where challenges are emerging, we can deploy training and safety programs for employees to improve our residents' experience.

CYBERSECURITY AND DATA PRIVACY

Cybersecurity and data privacy are critical components of our governance strategy. We recognize the importance of protecting our information and maintaining the trust of our residents, vendors, employees, partners and investors. Our IT Security and Compliance functions meet monthly, report to the Executive Leadership Compliance Committee (ELCC) quarterly and report regularly up to the Board of Directors. As part of our commitment to safeguard sensitive information and protect our stakeholders, we have implemented enhanced cybersecurity and data privacy measures, such as monitoring IT controls, to improve the integrity and confidentiality of our data.



Our **PATH FORWARD**

We strongly believe that our corporate responsibility efforts support our overall mission and vision and are committed to continual improvement of our environmental and social programs.

We have worked to establish a baseline of our environmental footprint and will continue to identify ways to improve efficiency and deliver long-term value for all our stakeholders including our residents, customers, employees, communities and investors.

Looking ahead, we plan to develop a holistic corporate responsibility strategy and further strengthen our responsible governance practices, which will allow us to continue growing a resilient business and delivering quality healthcare for our communities. In 2025, we will expand participation in our business resource groups, continue Foundation support for our employees and implement water and energy conservation improvements across our facilities. We will work to establish key performance indicators related to our corporate responsibility initiatives, which will allow us to measure our progress and develop goals in the future.

FORWARD-LOOKING STATEMENTS

This report includes information as of the date of its publication, unless otherwise indicated. The metrics and quantitative data presented in this report are not based on generally accepted accounting principles and have not been audited. Neither Trilogy nor any of its affiliates assume any responsibility or obligation to update or revise any such information, data, opinions, or activities. This report does not, and is not intended to, create any relationship, rights or obligations, legal or otherwise, and you should not rely upon this report for such purposes.

Forward-looking statements in this report about future performance, objectives, plans, expectations and other statements that are not purely historical reflect our current expectations; however, such statements involve risks and uncertainties. Actual results may vary from current expectations.





TRILOGY

HEALTH SERVICES

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