Querri

SENIOR LIVING BUYING GUIDE

Which community slipped last month?

One picture of every community

What owners ask, and where each number lives

Two communities can miss margin in the same month for two different reasons: census at one, agency labor at the other. You only see which is which when resident records, scheduling and payroll, and the ledger are read together. This guide shows where census, care, labor and margin each live, compares the common ways to get one picture of every community, and gives you the questions your CIO will ask any vendor.

Evergreen Communities, September 2026. The worked example is on page 5. SAMPLE DATA

ON TOP

All four communities

Occupancy	**90.7%**
Margin	**2.5 pts under budget**

Reads like one small miss.

UNDERNEATH

Maple Grove	Agency 16% of hours	**8.8 pts under**
Marrowgate House	84.9% occupied	**3.9 pts under**
Cedar Park, Oakwood	Both above 93% occupied	**Within 1.4 pts**

- A map of owner-report numbers to the systems they come from
- Five approaches, side by side, and what a business intelligence (BI) hire costs in year one
- Definitions to agree on before the next owner call
- Questions for any vendor that touches resident and payroll data, including us

Choosing analytics for a senior living operator.
For CEOs and COOs. About a 15-minute read.
Worth forwarding to your CFO and CIO.

THE ONE-PAGER

If you only read one page

The argument, end to end. Forward this page to anyone who only has two minutes.

1

Owner questions cross systems. Census and billing sit in the resident records, care levels in the care records, hours in scheduling and payroll, and margin in the ledger.

2

Today the join is a person. Someone in the business office or at the home office pulls exports and pastes them into the owner report, every month. The logic lives in their workbook.

3

Each system counts its own way. Finance and operations can bring different occupancy for the same community to the same call, and both can defend it.

4

Portfolio numbers hide which community moved. A small miss on margin can be census at one community and agency labor at another. The worked example on page 5 shows exactly that.

5

There are five ways to build the picture. Each has a place. Page 10 compares them, and page 11 prices the one most operators reach for first: a business intelligence (BI) hire.

6

Start with definitions, not tools. Agree on what occupancy, revenue per occupied unit, hours per resident day and margin mean, and write each one down once. Page 9 has the sheet.

2.5 pts

Under budget on margin across all four communities in September. One number on the owner report.

8.8 pts

Maple Grove's gap underneath it, where agency staff work 16% of the hours.

$7,150

A month of care delivered and not billed, across 6 residents at two communities.

SAMPLE DATA Evergreen Communities is a fictional operator with 4 communities and 408 units. All Evergreen figures in this guide are sample data.

START HERE

What's inside

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Read 01 and 02 yourself
The three decisions, and the problem that gets in their way.

Hand 03 to your CFO
Or whoever builds the owner report. It's a working sheet.

Hand 06 to your CIO
The security questions, with our answers and a blank copy.

01

SECTION 01

Three decisions, one picture

The owner report exists to answer three questions. Each one needs systems that don't talk to each other.

DECISION 1

Whether occupancy is turning into margin

"Occupancy is up. Is margin?"

LOOK AT

- Occupancy and rate, by community
- Margin against budget
- Care delivered against care billed

SYSTEMS THAT HAVE TO MEET

Residents · Care · Books · Budget

WHO OWNS THE DETAIL

Finance · Executive directors

⚠ A full building on discounts can earn less than a 90% one at street rate. A census report won't show it.

DECISION 2

Whether labor fits the residents you have

"What is agency labor costing you?"

LOOK AT

- Hours per resident day
- Agency and overtime share of hours
- Satisfaction beside both

SYSTEMS THAT HAVE TO MEET

Labor · Care · Surveys · Books

WHO OWNS THE DETAIL

Operations · Resident experience

⚠ Agency hours hit the schedule now and the ledger weeks later.

DECISION 3

Where next month's sales effort goes

"Census dipped. Is it leads, tours, move-outs or price?"

LOOK AT

- Inquiries, tours, move-ins, move-outs
- Cost per move-in, by source
- Rate against street rate

SYSTEMS THAT HAVE TO MEET

Sales · Residents · Books

WHO OWNS THE DETAIL

Sales and marketing

⚠ The sales system stops at move-in. Whether those residents stay, and at what rate, lives in other systems.

The pattern. Every decision needs at least two systems, and the numbers that explain the most need three or more. That's why the owner report takes so long to build and why the numbers in it get questioned. System names are spelled out on page 8.

DECISION 1 · WHY OPERATORS ASK

Rate, then occupancy

Larry Cohen, as CEO of Trustwell Living, argued that margins follow average monthly rate more than occupancy.

Source: Senior Housing News, May 2021

DECISION 2 · WHY NOW

90.4%

Average occupancy in NIC MAP's 31 primary markets, third quarter of 2026. Past 90%, says the CEO of 12 Oaks Senior Living, the job is holding services, staffing and quality.

Sources: Senior Housing News, Oct 2026 and July 2026

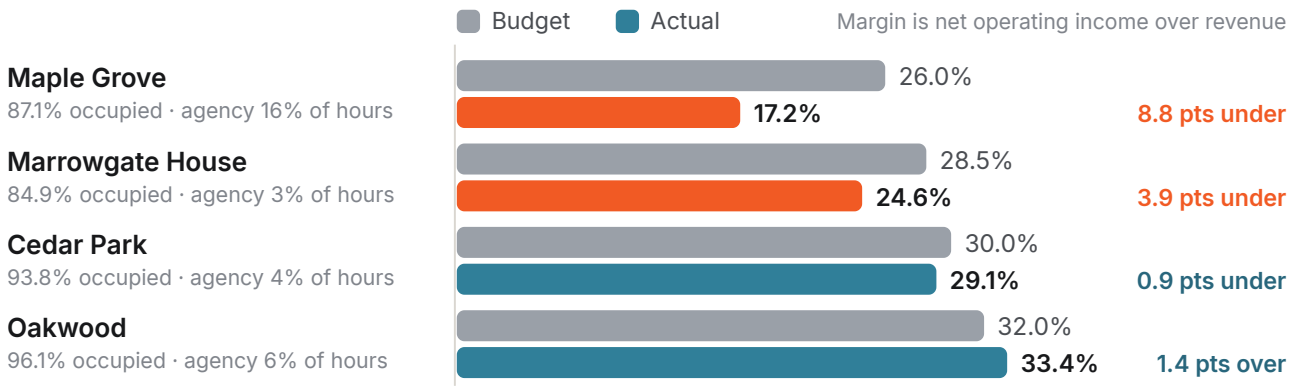
SAMPLE DATA

One small miss. Two different problems.

Evergreen ran **90.7% occupied** in September 2026, with margin 2.5 points under budget.

Margin against budget by community, September 2026

Residents, labor and the books, joined.



DECISION 1

$7,150

A month of care delivered and not billed, across 6 residents at two communities

DECISION 2

16% of hours

Agency staff at Maple Grove. The others run 3% to 6%.

DECISION 2

3.9 of 5

Maple Grove's third-quarter satisfaction, down 0.4

DECISION 3

14 move-outs

At Marrowgate House in the third quarter, against 9 move-ins

DECISION 3

9 of 25 left for more care

Of Marrowgate's 25 move-outs since April, 9 left for a higher level of care, and its memory care is full. Inquiries held.

DECISION 3

$11,600 in one incentive

Two first-month-free move-ins at Marrowgate cost more in year one than every other incentive combined. 15 units are still vacant.

What you do with this before the owner call

1. Ask Maple Grove's executive director what is behind the agency hours: open positions, call-outs or rising care needs.
2. Have the business office post the six missing care charges before close, and credit the one charge billed after a move-out.
3. Marrowgate's problem is move-outs. Look at memory care capacity before adding lead spend.
4. Stop leading with first month free. Professional referrals fill Marrowgate's rooms at $1,500 a move-in.

"Which communities slipped, and was it census, labor or both?"

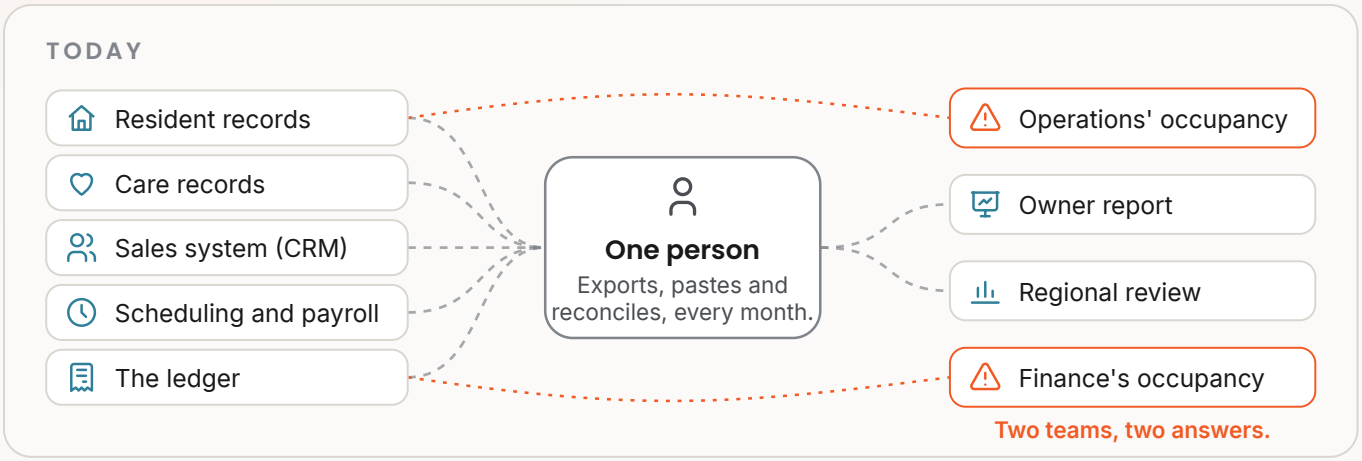
One question. Three systems. In Querri you ask it in plain language and click any number to see the tables behind it.

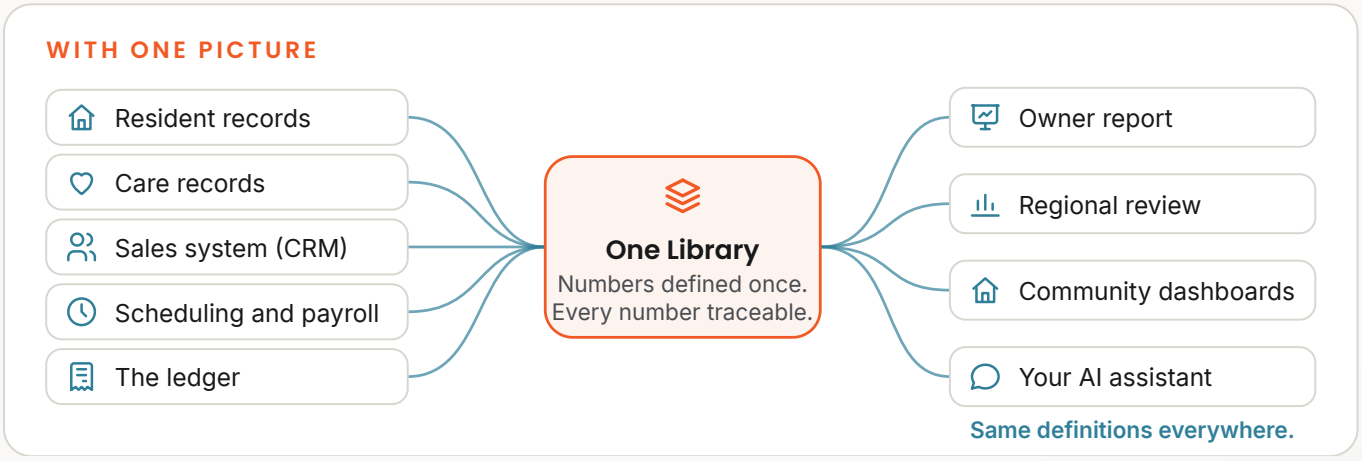
SECTION 02

02 The bigger problem

Your communities run on a handful of systems. Owners see one report. Something has to join them.

An operator runs on a short list of systems: resident records and billing, care records, the sales system, scheduling and payroll, and the ledger. Each stops at its own edge.





6:30 a.m.

What it looks like when someone builds it. Every morning, Ascent Living Communities (six communities) sends each leadership team a dashboard of the prior 24 hours. Its president names overtime, agency usage, scheduled against worked hours and resident acuity among the most useful data points.

Source: Senior Housing News, July 2026

> "You have to create that, it's bespoke."

Larry Cohen, as CEO of Trustwell Living, on analytics for senior housing. Source: Senior Housing News, March 2025

02 · THE BIGGER PROBLEM

What breaks when the join is a person

None of this is anyone's fault. It's what happens when the numbers have no shared home.

The logic lives in one workbook

Every month, someone exports, pastes and reconciles. When they're busy, the report is late. When they leave, the logic goes too.

Each system counts its own way

Finance may count occupied units over units in service. Operations may count residents over total units. Each is defensible. They don't match.

AI makes it faster, not right

Give every executive director an AI assistant and each one works out occupancy its own way. Same question, different confident answers.

> The question on the owner call shouldn't be "whose occupancy is right." It should be "what do we do about it."

What changes when the picture is shared

MOMENT	WHEN THE JOIN IS A PERSON	WITH ONE SHARED PICTURE
Building the owner report	Exports, pasting and reconciling, every month.	The report reads from the Library. Re-running it replays the same steps on new data, so last quarter's number doesn't quietly change.
A capital partner questions a number	Someone promises to follow up after the call.	Click the number and see every step behind it, down to the source tables and when they were refreshed.
A community moves	You find out when the month closes.	Monitors check each community's census, agency hours, move-ins and move-outs against its own history and say which one moved.
Finance and operations disagree	The call becomes a reconciliation.	Both read the same definition, written once.

How Querri fixes it

Resident, care, sales, labor and accounting data come into one Library on a schedule you choose. Occupancy, hours per resident day and margin are defined once, in plain language, and the owner report, the regional review and each executive director's numbers all read from it. Systems with no connector arrive as exports or a database copy.

SECTION 03

03 Where each number lives

The numbers owners ask for, and the systems each one has to pull from. Hand this to whoever builds the owner report.

OWNER-REPORT NUMBER	RESIDENTS	CARE	SALES	LABOR	BOOKS	BUDGET	SURVEYS
Occupancy	●		○				
Move-ins and move-outs, by reason	●	○	○				
Revenue per occupied unit	●				●		
Care delivered against care billed	●	●					
Hours per resident day	●	○		●			
Agency and overtime share of hours				●	○		
Margin against budget (net operating income over revenue)	○			○	●	●	
Cost per move-in, by source	○		●		●		
Move-in rate against street rate	●		●				
Resident receivables over 60 days	●				○		
Resident and family satisfaction	○			○			●

● Needed to calculate it ○ Needed to explain it (by community, source or cause)

Residents: the resident system, with census, the rent roll and billing. Sales: the sales system (CRM). Labor: scheduling and payroll. Books: the ledger, including ad and referral spend.

Why community numbers drift apart

Which units
Total units or units in service? Does a second resident in a unit count?

When you count
A daily average, the month-end figure, or one day's count each week.

Transfers
Assisted living to memory care: a move-out in one report, a transfer in another.

Care levels
The assessment changes mid-month. The charge changes next month, or not at all.

Agency hours
On the schedule this week, in the ledger when the invoice posts.

03 · WHERE EACH NUMBER LIVES

Agree on the definitions first

Common definitions, and the one decision each needs before it goes in front of owners. Pick one, write it on the line, use it in every community.

NUMBER	A COMMON DEFINITION	DECIDE AND WRITE DOWN
Occupancy	The share of your units with a resident in them. `Occupied units ÷ units in service`	Units in service or total units? A daily average or month-end? Does a second resident count? YOUR DEFINITION
Revenue per occupied unit	What an occupied unit earns in a month. `Resident revenue ÷ average occupied units`	Rent only, or rent plus care fees? Are concessions taken out? YOUR DEFINITION
Hours per resident day	Staff time for each resident, each day. `Worked hours ÷ resident days`	Care staff only, or every department? Worked or paid hours? Agency in or out? YOUR DEFINITION
Agency share of hours	How much of the work agency staff do. `Agency hours ÷ all worked hours`	Of all hours, or of care hours only? YOUR DEFINITION
Margin	Net operating income (NOI) as a share of revenue. `NOI ÷ revenue`	Before or after management fees and home office costs? YOUR DEFINITION
Move-in and move-out	A resident starting or ending a stay. `Counted from the resident records, by date`	Is a transfer between care levels either one? Deposit date or move-in date? Do respite stays count? YOUR DEFINITION
Cost per move-in	What a source costs for each resident it brings. `A source's spend ÷ its move-ins`	Referral commissions in or out? Bill date or the month it ran? YOUR DEFINITION

In Querri, you say it once. Teach the definition in plain language ("occupancy counts units in service, and a transfer is not a move-out") and every answer after that uses it, for every person and every tool.

SECTION 04

04 Five ways to build the picture

Every operator picks one of these, on purpose or not. Here's how they compare.

	BY HAND	EACH SYSTEM'S OWN DASHBOARDS	A BI BUILD	EACH LEADER'S AI ASSISTANT	ONE SHARED LIBRARY (QUERRI)
What it is	Spreadsheets and an owner deck, rebuilt monthly	The reports inside your resident, care and accounting systems	A warehouse, a BI tool, and a consultant or hire	Each leader asks an assistant about their own exports	Your systems joined in one Library, for every team and AI tool
Where the definitions live	One person's workbook	Each system, counting its own way	The data model, while someone maintains it	Each person's prompt	The Library, written once in plain language
A new owner question	An analyst rebuilds the deck	Only what each report covers	Joins the builder's queue	Yes, for the data each person gives it	Ask in plain language, across every system
Trace a number to its source	Ask whoever built the sheet	Inside each system's report	In the code, if you can read it	Rarely	Click any number to see every step and source table
First answer	Next month's report	Right away, inside each system	Months: a hire or a consultant, pipelines, then dashboards	Same day, but each person's differs	Minutes on sample data, then on your own systems
What it costs	Someone's week, every month	Already paid for	About $188K in year one (page 11)	Seats you have, plus time reconciling answers	A subscription, free to start. Estimator at querri.com/senior-living
Good for	Getting the first owner report out	Questions one system answers alone	Heavy pipelines and custom models	A quick look at one spreadsheet	Every community and the owner report on the same numbers
Where it breaks	When that person is busy or leaves	At the edge of each system	Cost and time before the first answer	Two leaders, two different occupancies	Billing and posting stay in your resident system. Systems with no connector arrive as exports or a database copy

✓ **Keep your systems' own reports.** They're good inside their own system and they stop at its edge. They're sources for the picture, not the picture.

What a BI hire really costs in year one

The salary is the number on the requisition. Here is the rest, with a column for yours.

YEAR-ONE LINE	PUBLIC FIGURE	WHERE IT COMES FROM	YOUR NUMBER
Salary	**$120,230**	United States median for the wage group that includes business intelligence analysts. O*NET OnLine, 2025 wage data	
Benefits and other employer costs	**$51,530**	Benefits average 30.0% of total compensation in private industry, which adds about $51,530 to this salary. Bureau of Labor Statistics, June 2026	
A warehouse and tools to load it	**$12,000**	One published first-data-hire budget: $10,000 for a warehouse, $2,000 for loading tools. Fabi.ai, Nov 2024	
BI licenses	**$4,200**	25 people on Power BI Pro at $14 a user a month, paid yearly. Microsoft list price, read Nov 2026	
Year one, before the first report	**$187,960**	The four lines, added: about $188,000. The same published budget puts a senior first data hire near $300,000 all in.	

What the table leaves out

- Recruiting, and the months the seat is open
- A consultant to build the first data model
- Starting over when that person leaves

When the hire is the right call

- You run heavy production data pipelines
- You build custom machine learning models
- A data team already models your census and finance data

Already have a warehouse, or a BI team? Keep them. The warehouse connects to Querri as a source, and Querri syncs a copy on a schedule.

Questions to settle before you choose

1. **What do owners ask that we can't answer in a day?**
   That list is your requirements. Most of it will cross two or more systems.
2. **Who will own the definitions?**
   A tool can hold them. Someone still has to decide them. Usually it's the CFO.
3. **What will our CIO and compliance lead need to see?**
   Resident, care and payroll data mean a security review. Section 06 has the questions.

05

SECTION 05

What you'll hear

Five things your leadership team will say when you propose fixing this. What's right about each, and what it misses.

"The spend has to pay back."

What's right. It does, and you should ask that of every option.

What it misses. Doing nothing has a price too: the hours your business office and regional teams spend each month on community reports and the owner package. Set any option against that, and against the cost on page 11.

"We already have reports in our resident system and our ledger."

What's right. Inside their own system, they're good. Keep them.

What it misses. They can't answer a question that crosses systems, and that is most of what owners ask.

"Our systems don't connect to anything."

What's right. Some senior living systems are hard to get data out of.

What it misses. The picture doesn't need a direct connection to every system. Scheduled exports, a database copy and file uploads count. Ask any vendor, including us, which of your systems arrive which way.

"We'll just have every executive director ask an AI assistant."

What's right. The tools. People should keep using them.

What it misses. Each person's assistant works out occupancy its own way, so an executive director and a regional vice president bring different numbers to the same call. Whatever you pick has to put the company's definitions inside those assistants. Querri works inside them.

"We'll hire someone to build the dashboards."

What's right. It's a good hire, eventually.

What it misses. Their first months go to getting the resident system, payroll and the ledger to agree, at about $188K before the first report (page 11).

> Under every one of these is the same point: the systems you have are fine inside their own walls. The work is joining them, and keeping them joined.

SECTION 06

06 What your CIO will ask

Resident, care and payroll records are the data you can least afford to have loose. Ask every vendor these, including us.

THE QUESTION	WHY IT MATTERS	QUERRI'S ANSWER
Where do the AI models run?	Resident and payroll data goes wherever the model runs.	Amazon Bedrock and Microsoft Azure, in the United States.
Is our data used to train models?	Resident, care and payroll records shouldn't end up in anyone's model.	No. Your data, prompts and results never train any model.
Is our data kept apart from other operators'?	Shared storage widens the damage if something goes wrong.	Every customer organization gets its own database and its own storage, encrypted at rest with AES-256.
Do our access rules apply before the AI sees anything?	An executive director shouldn't reach another community's residents through a chat box.	Yes. Row-level access rules apply first, so an executive director gets answers from their own community and a regional vice president from their region.
Who sees our system passwords?	Connector credentials are keys to resident records and payroll.	An agent sets up each connection with you and never sees your passwords.
Can it change a resident or payroll record?	Reporting should read, not write.	No. Querri reads from the systems you connect and never changes a record in them.
What can we verify independently?	Claims are easy. Audits aren't.	SOC 2 Type II and ISO 27001:2022 certified, and HIPAA compliant. Details at querri.com/security/trust-center.

Make the review quick. Send the blank copy on page 14 to every vendor on your list and compare the answers. Ask for the SOC 2 Type II report, and for a list of exactly what each connector reads.

Start small. Connect census and the books first and ask which community moved. Add scheduling and payroll once the first numbers match what finance expects.

SOC 2 Type II · HIPAA · ISO 27001:2022

06 · WHAT YOUR CIO WILL ASK

The same questions, for every vendor

A blank copy to send. Put two vendors side by side, or print one page per vendor. Querri's answers are on page 13.

THE QUESTION	VENDOR _____	VENDOR _____
Where do the AI models run?		
Is our data used to train models?		
Is our data kept apart from other operators'?		
Do our access rules apply before the AI sees anything?		
Who sees our system passwords?		
Can it change a resident or payroll record?		
What can we verify independently?		

✓ **Three things to ask for in writing.** The current SOC 2 Type II report. A list of exactly what each connector reads in your resident, care and payroll systems. And, if the vendor will hold protected health information, a signed business associate agreement.

07

SECTION 07

Before your next owner call

A four-step audit you can run this week. It works whichever of the five approaches you choose.

The four-step audit

1. **List every number in your last owner report**
   Next to each one, mark the systems it came from. Use the map on page 8.

2. **Find the numbers two teams report differently**
   Ask finance and operations for last month's occupancy at one community, on the same day. The gaps are the definitions to settle first.

3. **Write the definitions down**
   One line each, using the sheet on page 9. Get your CFO to sign off.

4. **Ask one cross-system question**
   "Which community slipped last month, and was it census, labor or both?" Note how long the answer takes and how many people touch it.

NUMBER IN THE REPORT	SYSTEMS IT COMES FROM	WHO BUILDS IT	SAME DEFINITION EVERYWHERE?
			Yes / No
			Yes / No
			Yes / No
			Yes / No
			Yes / No
			Yes / No
			Yes / No
			Yes / No
			Yes / No
			Yes / No
			Yes / No
			Yes / No

NEXT STEP

See which community moved, on your own numbers

Bring the question from step 4 to a 30-minute call, and we'll answer it with you on your own data.

Book a demo

querri.com/demo-request

Not ready for a call? Run the four-step audit on page 15, then put your own numbers in the estimator at querri.com/senior-living.

One picture of every community, so you, your regional vice presidents and every executive director decide from the same numbers.

Querri brings census, care, labor, sales and the books together for every community. Occupancy, hours per resident day and margin are defined once, so the owner report, the regional review and every executive director's numbers agree.

The same picture from each seat

Finance

Every level of care billed, and each community's margin explained against budget.

querri.com/senior-living/finance

Sales and marketing

See why census moved, and put next month's spend where move-outs are coming.

querri.com/senior-living/growth-ops

Resident experience

See which communities and residents need help first, before it shows up as a move-out.

querri.com/senior-living/customer-success

125+ connectors, plus spreadsheets and database exports · **Works inside your AI assistant** · **SOC 2 Type II, HIPAA, ISO 27001:2022** · Never trains a model on your data

Which community slipped last month?

Querri it

Evergreen Communities figures are sample data from a fictional operator.