



Strategic Plan Development Phase Launches!

Overview

Our Strategic Planning Committee is excited to announce the launch of the Board's process to develop a new 5-10 year strategic plan, one that guides us into the future and promotes our Mission and Philosophy to provide a diverse, vibrant, and caring community for our residents, staff, board, families and other stakeholders.

Collington's successful growth and momentum provide a strong foundation from which to build strategic direction. Our plan will embrace our strengths while preparing for changes that we know are coming in the environment around us. As hockey star Wayne Gretzky said, *"I skate to where the puck is going to be, not where it has been."* The coming years will be a time when demographic and market shifts are beginning to alter the landscape of senior living. Strategic planning calls on us as a whole community to be ready for these changes with innovative approaches that also preserve our values and sense of community that makes us who we are.

You – our residents, board, and staff – will have multiple formal and informal opportunities to be included in the process over the coming months. We are also tapping the expertise and experience outside our walls, including the resources of groups such as LeadingAge, Kendal and others. We hope many of you have been able to attend the educational sessions for the whole community on these broad strategic issues.

Our planning process is being supported by our facilitator, Lizann Peyton. Her role is to help us guide the process and share examples from her work with over 150 nonprofits, while leaving the content and decision-making in the hands of the Board and Strategic Planning Committee.

Strategic Themes and Work Groups

One first step has been to establish eight Work Groups on critical strategic issues, and those groups have just begun meeting this month. Their purpose is to help Strategic Planning Committee dig more deeply into research and investigation of the issues, our needs, and innovative possibilities. They are not decision-making groups; they are our "eyes, ears, and hands" to do the exploration and suggest a range of options to evaluate. Each work group consists of two Co-Chairs and a group of members drawn from our resident community, board, and staff because of their interest, expertise, and availability for three or more months of intense work. The Work Groups are formed around strategic themes suggested or discussed by engaged stakeholders:

Finance:	Co-chairs:	Dick Garrison & Gerry Perez
Human Capital:	Co-chairs:	Denny Klass & Cindy Medlock
Health Services:	Co-chairs:	Peter Fielding & Julia Freeman
Campus Infrastructure & Physical Environment	Co-chairs:	Alice Nicolson & Karen Boyce
Community Outreach:	Co-chairs:	Ken Burton & Susan Deller
Serving Moderate & Low-Income Seniors	Co-chairs:	Larry Harris & Joe Howell
Collington's Culture	Co-chairs:	Kay Laughton & Nancy Lively
Intergenerational Engagement	Co-chairs:	Mike Nolin & Helen Lauck

The mission and membership of each Work Group is attached, and we encourage you to learn more about their work. Two over-arching themes – technology, and “the New Senior” (Boomer generation and their needs and wants) – are being integrated into all groups rather than be established as stand-alone topics.

Timeline

Each Work Group will spend roughly three to six months exploring its topic and preparing options for consideration by the Strategic Planning Committee. Their work will be coordinated through monthly meetings of the Strategic Planning Committee (whose representation includes a co-chair from each Work Group, and all co-chairs are encouraged to attend). The Board will receive regular updates at its monthly meetings as well. By June 2017, we expect to have an initial draft of the strategic plan to share with the Board – by which time our community will also have learned more about the emerging priorities.

Keeping You Informed and Involved

We are committed to keeping you regularly informed throughout the planning process, through avenue such as updates in The Courier, email blasts, the Residents Association and its blogs and website, in house TV channel, community meetings and presentations, and through the Board of Directors and Staff. We want everyone to feel they have a strong sense of how our work is proceeding. And we need your help!

And we want your input too! Once the Work Groups have time to do some initial research and investigation, the Strategic Planning Committee will be coordinating and publicizing more structured ways for Residents, Board, and Staff to share ideas. These might include discussion groups, community meetings, surveys, or other formats. We can't promise that every suggestion

will end up in our strategic plan. There will be realities to how much we can take on at once. But we promise that your ideas will be heard.

Call to Action!

- If you have thoughts or ideas but aren't serving on a Work Group, you're welcome to share input with the Co-Chairs.
- If you have a topic or speaker that would be of broad interest to the community and related to our strategic themes, let Marvell Adams or a Work Group Co-Chair know. We want strategic planning to be a community learning experience too!
- Have an artistic or graphic design talent? We're looking for input on a logo or pager header that would brand strategic planning updates as easy to recognize in our multiple methods of communication. Let Marvell Adams know if you have suggestions.

Questions?

Feel free to get in touch at any time with Marvell Adams or any of the Work Group Co-Chairs.

Strategic Planning Committee members:

Annetha Hall, SPC Chair and Board Member

Ken Burton, Board Member and Resident

Pat Howard, Residents Association President

Kay Laughton, Board Member and Resident

Cindy Medlock, Board Member

Richard Zorza, Resident and Technology & Communications Committee Chair

Marvell Adams, Executive Director

Karen Boyce, Chief Operating Officer

Susan Deller, Director for Sales and Marketing

Justin Reaves, Chief Financial Officer

Karen Cheney, Chief of Administration

Lizann Peyton, Facilitator



Strategic Themes & Work Groups

The Themes below are fitted into one of two categories: 1) Core Business & Function and 2) Organizational Philosophy. Each is an important aspect of developing the strategic plan and must work in conjunction.

Core Business & Function refers to aspects of Collington that drive the service deliverables that we commit to provide to each and every stakeholder. This includes: Health Services, Campus Infrastructure & Physical Environment, Finance and Human Capital.

Finance

- This group would explore the complexities of the financial infrastructure necessary for Collington's continued success. Exploration of future financial restructurings and long-term financial goals.

Human Capital

- This group would take on the "person power" that drives Collington. Human services and the capital needed to make our mission possible. Key areas would include future workforce needs and what that workforce looks like as well as how to surpass employee engagement.

Health Services

- This group would focus on the health care portions of Collington including assisted living, skilled nursing, dementia care and rehabilitation as well as clinic services. Other service lines such as adult day services and aide service would be potential areas to explore. Capitalizing on Kendal initiatives like Vitalize 360 would be a potential key topic.

Campus Infrastructure and Physical Environment

- This group would consider the future needs of the campus, its layout, unit composition, etc. Consideration of a campus master plan would be one factor to explore.

Organizational Philosophy refers to the community's spirit, culture and mission as it relates to Collington's future as a provider of services. These themes provide guidance and vision to our Core Business & Function but alone cannot produce the deliverables that make life at Collington possible.

Community Outreach

- This group would look at the Kendal at Home model and other non-campus based models as well as how might Collington be a resource and service provider to older adults in the wider community. Community partnerships and other engagements would be considered.

Serving Moderate & Low Income Seniors

- This group would look at if/how Collington could serve individuals with more modest means.

Collington's Culture

- This group would explore the nature of the Collington's culture inclusive of its many stakeholders (residents, staff, Kendal, etc.) and implications for the future. Issues like racial, economic and class diversity and inclusion, how the culture makes Collington what it is, along with ideas for addressing culture issues. Additionally, the intellectual curiosity and international perspective of the community as well as lifelong learning would be areas of consideration.

Intergenerational Engagement

- This group would focus on ways to bring intergenerational components to Collington Life including ways to serve other generations as a means to enrich the lives of Collington residents.

Overarching Themes: These topics should be interwoven within all groups.

- The "New Senior": Boomer Generation and their interests, needs, wants.
- Innovations/Technology: This group would explore very forward thinking and out of the box topics that would be cutting edge and first to market type initiatives. Pervasive technology integration would be a key factor.

October 27, 2016