

STRATEGIC PLAN | 2022 - 2025

Wesley Woods Senior Living

GROW OUR MISSION

The US population is aging. It is the fastest growing segment of the population. The number of Americans age 65 and older will more than double in the next 40 years. Georgia is certainly included in this incredible growth, and the housing needed to care for these seniors is in short supply. Moreover, 70% of all older adults will eventually need some assistance with daily tasks, which can cost, on average, upwards \$60,000 annually. Unfortunately, many seniors fall in a gap—they earn too much to qualify for safety net programs like Section 8 or Medicaid, yet they cannot afford even the minimal housing and services they will need as they age, they are the middle income. This group is more racially diverse, is more educated, and has smaller, more widely dispersed families upon which they can depend for help.

Wesley Woods must stand in this gap. Wesley Woods currently serves a small portion of these older adults. Understanding the challenge, the board has determined that we will expand our housing and service portfolio to serve this underserved group of older adults. We will seek opportunities to develop, acquire and/or manage additional communities. Where we have land, we will seek to develop additional housing inventory at our current communities.

GOAL: INCREASE THE NUMBER OF PEOPLE WE SERVE

Objective 1

Develop additional independent and/or assisted living properties that are developed in such a way as to be financially successful while serving middle and low income older adults in Metro Atlanta.

Tactics

- Continue working with Development consultant with deep experience in the senior living field
- Engage a Real Estate Broker that knows the metro Atlanta area
- Complete market studies, where appropriate of Metro Atlanta areas to determine best placement and greatest need.
- Explore the powerful opportunities to partner with churches in the North Georgia United Methodist Church or our other Methodist affiliated entities to identify collaborative mixed ministry partnerships.

Objective 2

Increase inventory at existing communities. (e.g. Blairsville and Newnan)

Tactics

- Conduct a market study to determine regional demand.
- Working with architect firm, complete master planning of these campuses based on market data.
- Seek funding.

Objective 3

Acquire and/or manage properties with comparable missional scope.

Tactics

- Network within industry associations and leadership.
- Engage Real Estate brokers that specialize in senior and affordable housing to identify properties
- Engage lenders specializing in senior living financing to identify any troubled properties that are seeking a change in management agent or to divest.

INNOVATE OUR SERVICE MODEL

Boomers are the most technologically savvy retirees to date. More than 68% use a smartphone. Moreover, as consumers, they expect more choice, more flexibility and a more personalized experience. With 10,000 Boomers reaching retirement age every day, our amenities, services and programs must keep pace with these expectations. Technology is essential to this change, not only as a way to enhance the resident experience but as a care management tool—collecting data and monitoring healthcare outcomes to make better, smarter choices.

Also important is our mission to create community and connections. To do so, our culture of person directed wellbeing must meet the expectations of a more active, engaged and social generation. We are a high-touch industry and must not lose that to the allure of the latest technology. That said, we must meet the increasingly sophisticated needs of today's residents while futureproofing our service model for the residents of tomorrow.

GOAL I: SMART INFRASTRUCTURE

Create a smart, secure infrastructure to support the changing needs of the staff and residents.

Objective 1

Understand the security and service “gaps” within our current IT structure that hinder our ability to work efficiently and effectively now and grow into the future.

Tactics

- Engage the services of a business technology expert to complete a focused analysis and assessment of the organizations Information Technology
- Using the assessment, develop a comprehensive business driven technology roadmap to define priorities and action items

GOAL II: CULTURE AND MISSION ALIGNMENT

Create a consistent culture of person directed wellbeing and care for the residents and staff.

Objective 1

Evaluate the depth to which person directed wellbeing and care is fully deployed across the organization

Tactics

- Using the results of the resident and staff satisfaction and engagement survey, take action to address feedback as appropriate
- Obtain EAGLE Accreditation from the United Methodist Association

Objective 2

Fully deploy the Eden Alternative Philosophy

Tactics

- Identify the current milestone under way within each community currently certified under the Eden Alternative philosophy.
- Identify what communities will become Eden Alternative certified and develop a plan for obtaining certification

Objective 3

Provide best in class dementia care model

Tactics

- Identify the best-in-class dementia care model
- Develop a plan for adoption and implementation

INVEST IN OUR EMPLOYEES

If the pandemic has taught us nothing else, it is that our employees are our greatest asset. Capitalizing on our strong culture, we will continue to invest in our employees—their success ensures Wesley Woods' success. Providing opportunities for advancement through the creation of career ladders, life skills training and a robust leadership development program, we will build the next generation of leaders and foster a workforce that is more inclusive, more equitable, and purpose-driven to meet the challenges of a changing world.

GOAL I: DEVOTION

Create an exceptional onboarding experience to set performance expectations, ensure consistency and foster a sense of belonging.

Objective 1

Review current training processes and identify gaps. Keep what is working, improve what is not.

Objective 2

Identify the components of onboarding and orientation from date of hire through the entire first year. Do this for all areas of the organization—dining, maintenance, housekeeping, administration, etc.

Objective 3

Create classes, instructional videos, online tools and a training manual to orient, educate and prepare new hires for employment at Wesley Woods.

GOAL II: MASTERY

Create an exceptional training program that ensures consistency and proficiency across all communities, provides opportunity for growth and prepares employees and leaders to deliver their best.

Objective 1

Hire an Organizational Development / Diversity, Equity, and Inclusion director to elevate employee development and the organizations culture.

Tactics

- Develop a training curriculum focused on hospitality, life skills and leadership skills.
 - Review current leadership training processes and their effectiveness, identify the gaps in skillset
 - Identify a system to track and maintain training levels across the organization.

GOAL III: LOYALTY

Establish a clear path for career development that includes opportunities for promotion as well as rewards, recognition and incentives that foster loyalty and motivate employees to do their best.

Objective 1

Ensure all job descriptions clearly describes each job and captures our culture and brand within the language.

Tactics:

- Evaluate each job description to ensure person centered language is being used to describe the work

Objective 2

Develop clear paths for position laddering and career advancement.

- Differentiate between Is and IIs, leads and supervisors, etc.
- Create consistency across communities, when possible, for similar or comparable jobs.

Objective 3

Establish rewards and recognition system and integrate it into the current performance review process.

Objective 3

Strengthen relationships with feeder schools. (e.g. culinary and nursing schools, Goodwill, etc.)

BUILD OUR COMMUNITY CONNECTIONS

Society is strong to the extent older adults are valued. This is a core tenant of The Wesley Woods Way and central to the experience of residents living in Wesley Woods communities. To fully realize this value, we need to forge relationships with the greater community leveraging resources, talent and programming that can enhance the resident experience and/or make improvements to the community. In turn, we need to share with the community the resources, talents and programming that we have to offer to further strengthen community connections and provide opportunities for residents to give back.

GOAL I: CREATE AN OUTREACH INFRASTRUCTURE

Create a sustainable Outreach Program that leverages the resources of the Wesley Woods community, identifies needs of the Wesley Woods community as well as the surrounding community, finds resources and people to address those needs and forges relationships with those resources and people.

Objective 1

Prepare administrators and executive directors to be the driver of the outreach program at each community.

1. Integrate outreach responsibilities into the administrator/executive director job description.
2. Establish goals for outreach for the admin/EDs at each community.
3. Train Administrators and EDs to cultivate relationships and network in the greater community.

Objective 2

Develop an infrastructure for community cultivation to ensure consistency and sustainability of the program.

1. Each Admin/ED should create a community outreach task force that includes stakeholders from the community. (e.g. head of resident council, sales and marketing, Chaplain, nursing and LEDs.)
2. Create focus groups and survey instruments to engage the community in the conversation. Integrate these into the community's annual communications flow.
3. Cultivate and maintain a robust advisory council at each community.
4. Require an annual outreach plan with goals for the year for each community.

GOAL II: INVENTORY RESOURCES & NEEDS

Inventory what the community has to offer and what it needs in terms of resources (i.e., *financial and physical plant*), programming and talent or expertise and identify where those can be found in the greater community.

Objective 1

Inventory what each community has to offer in terms of talent and resources and conversely, what the community needs in terms of talent and resources.

1. Conduct focus groups to engage stakeholders in the conversation.
2. Identify resources, influencers, donors and/or partners in the greater community.

GOAL III: CREATE AND EXECUTE OUTREACH PLAN

Develop an outreach strategy to establish connections to needed resources in the greater community. (*Strategies will vary depending on the make-up and needs of the community.*)

Objective 1

Develop an outreach strategy to the resources, influencers and potential donors who have been identified.

1. Tailor the outreach to fit the resource.
2. Assign the appropriate liaison to cultivate the relationship.
3. Draft MOUs with partners when appropriate.

Objective 2

Create and execute an Outreach Program

1. Write a plan based on the strategies developed.
2. Admins/EDs will hold monthly meetings with the Outreach Program task force to review progress.
3. Admins/EDs will hold quarterly meetings with the Wesley Woods Foundation to review progress, get feedback and identify new needs and new opportunities.