

MORAVIAN HALL SQUARE
Strategic Plan

2009-2013



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Our Core Purpose

Enrich the lives of all those we touch.

Our Mission

Moravian Hall Square honors the unique value of older adults by providing lifestyle choices, supportive services, and security to enrich the journey of aging.

Our Core Values

1. We live compassionate care.
2. We are committed to life-long wellness and vitality.
3. We are passionate about service and serving.
4. We create, promote, and foster community.
5. We respect diverse faiths and our Moravian heritage.
6. We embrace innovation.

Our Philosophy of Resident Life, Wellness and Care

Moravian Hall Square's philosophy of resident life, wellness and care is guided by our staff's core purpose – to enrich the lives of all those we touch. We actively strive to provide the highest attainable standard of wellness and care, enabling residents to experience the full richness of life, regardless of age or health condition. We acknowledge the importance of fostering a collective spirit of “community” in a compassionate, comfortable and secure environment. Our programs and services are reflective of our faith-based ministry and strong affiliation with the Moravian Church. As we actively endeavor to meet the diversified faith traditions and spiritual needs of our residents, we are mindful of the Moravian Church motto:

**“In essentials, unity.
In non-essentials, liberty.
In all things, love.”
–Moravian Motto**

A Message from the President and CEO



The old era of ‘long term care’ is fading, as sure as the alms houses, widows and orphans homes, asylums, and sanitariums over 150 years gave way to rest homes, nursing homes, high-rises, and meals-on-wheels of the past 40 years. A new language, reflective of an emerging new era, is breaking through: home and community-based services, adult day care, life care, continuing care, personal care, and active adult communities are terms now used as part of the ‘new era.’ Even staff and trustee labels are changing.

Today, much of what we do can sound very clinical and corporate. Everybody is a ‘certified’ something or other or an ‘executive’ or ‘chief’ this or that. We have ‘holding companies’ and ‘subsidiaries,’ clinical ‘outcomes,’ ‘corporate compliance’, and of course, ‘strategic planning’. The widows and orphans homes of the past have come a long way, assuming that today’s transformed organizations have the mindset to embrace innovation and the heart to remain engaged in a ministry committed to creating a healthy community that offers love and respect for all lives served.

In its 21st year of operation, Moravian Hall Square remains devoted to its mission to honor the unique value of each individual, older adult whom we serve. Through years of diligent strategic planning, our strategic directions and action plans have changed from time to time and will continue to do so. However, our organizational values and core purpose – to enrich the lives of all those we touch – remain just as constant today as they did when we first opened our doors in 1988.

When it comes to human services, innovation toward positive change is the mandate of the not-for-profit sector. For a generation, our organization has worked hard to satisfy the unmet needs of the older adults who chose to call Moravian Hall Square home. This newest, five-year strategic plan advances our new vision for this community – a vision that we expect to fulfill to the best of our ability to ensure that residents and their varied supporters receive the services that they desire, need, and expect.

Albert Camus, the French philosopher, said, “In the depth of winter, I finally learned that there was in me an invincible summer.” There is an invincible summer – a determination to live life to the fullest until the end – in most all of the people we serve. Through innovation, compassionate care, and our passion for service to others, we can make possible many invincible summers today and in the future.

Moravian Hall Square is made up of many ordinary people doing extraordinary things, including paid staff as well as volunteers. Countless times I have heard comments similar to this: “This is an amazingly warm and friendly place. These are remarkable people. Angels. I don’t know how they do what they do every day.” Ordinary people doing extraordinary things. We envision our future to include even more extraordinary things carried out by those of us who are ordinary people, committed to the unique value of every person served.

Susan C. Drabic

Susan C. Drabic
President and CEO

Moravian Hall Square Strategic Plan: 2009-2013

Our Strategic Focus Areas

1. Growth

Moravian Hall Square must expand its services and housing capacity to remain viable and attractive to current and prospective residents as well as to retain its financial viability.

2. Wellness and Vitality

Moravian Hall Square must integrate a wellness mindset into all programs and services to support our core value of life-long wellness and vitality.

3. Resident-Directed Living

Moravian Hall Square must develop and empower more effective, integrated staff teams that proactively encourage meaningful resident and family participation in decision-making.

Our Strategic Directions

1. Respond to consumer demand for a broader range of housing choices for senior adults.
2. Develop a written business plan for the expansion of the current Resident Health and Wellness office into a private duty home care agency serving residents and the local community.
3. Research and identify additional and creative ways to generate revenues.
4. Research opportunities for strategic networks and partnerships which produce efficiencies and economies of scale, improved services and creative use of human resources.
5. Develop a long-term business plan for the Resource Development office to include cultivation of new donors, development of additional planned giving opportunities and the establishment of our own charitable foundation.
6. Consider all options for additional, licensed nursing care or rehab beds.
7. Research models for a “life care at home” program to be offered to the greater Nazareth community.
8. Address the space and amenity needs in Bethany House personal care.

1. Develop, promote and implement plans for a new, coordinated program for resident and employee health and wellness.
2. Position the new wellness program to become a major marketing and recruiting tool for prospective residents and employees.
3. Review and enhance campus dining, nutritional services and amenities to correlate with wellness initiatives and changing resident needs.
4. Identify additional programs to benefit resident and employee wellness and vitality.
5. Focus new programming on bringing humor into the workplace.
6. Develop educational opportunities for residents and staff to embrace healthier lifestyles.

1. Integrate a resident-directed model of care delivery in our nursing care neighborhoods.
2. Integrate a resident-directed model of care delivery in our personal care neighborhoods.
3. Develop a new model for dementia care in our licensed nursing care environment.
4. Self-evaluate current model of care delivery as related to resident-directed model as a follow-up to the outside consulting firm’s evaluation results.
5. Evaluate and restructure the volunteer program with an emphasis on resident-directed programs and events.

Our Success Indicators

- 1.0 Break ground for the new residential cottage campus.
- 2.1 Hire a Private Duty Agency Coordinator.
- 2.2 Implement private duty home care program.
- 3.1 Conduct a competitive bidding process for the management of the Moravian Hall Square investment portfolio account.
- 3.2 Improve average Independent Living occupancy to 95%.
- 3.3 Assess current therapy program, investigate the possibility of bringing services in-house, and research steps to obtain an outpatient license if recommended.
- 3.4 Implement in-house billing of Medicare B claims.
- 3.5 Increase net revenues by 10% based on the assumption that more residential units will be operational.
- 4.1 Assess the benefits of participation in self-insurance pool with other CCRC communities.

- 1.1 The five sub-groups of our Wellness and Vitality “Dream Team” (Physical, Social, Spiritual, Mental and Nutritional) will each develop goals and will establish wellness outreach programs at least three times per year.
- 1.2 Complete the integration of the various “Collage” wellness and assessment tools and reports into the operation of the Resident Health and Wellness Office and Bethany House and Morningstar Personal Care.
- 2.1 Put collateral materials in place to market and promote wellness initiatives for residents, employees and community.
- 2.2 Create positive awareness of MHS wellness programs through public advertising media including Web-based advertising, news releases, story placements, special events and other methods.

- 1.1 Obtain cost-effective educational resources that provide training to nursing care staff on the journey of resident-directed living.
- 1.2 Define and establish program goals, timelines and budget impact of the resident-directed living initiatives.
- 1.3 Visit at least four other local or regional communities that have transitioned to the resident-directed living model.
- 2.0 Obtain cost-effective educational resources that provide training to personal care staff on the journey of resident-directed living.
- 3.0 Implement new dementia care program model in our licensed nursing care environment.

- 4.2 Develop a written plan for potential strategic partnership opportunities.
- 5.1 Implement programs to increase the resource development of major gifts and income.
- 5.2 Document the timing for and process of forming a foundation.
- 5.3 Reach \$1 million in assets in the Good Samaritan Endowment Fund and develop a spending plan for the earnings.
- 6.0 Investigate and complete a feasibility study for additional licensed nursing care and/or rehab beds.
- 7.0 Implement a “life care at home” program.
- 8.0 Develop a written business plan that addresses the future of Bethany House as a personal care facility or “other”.

- 3.1 Continue to add healthy menu selections into all dining areas to support wellness and vitality initiatives.
- 3.2 Offer individualized nutritional coaching to all residents based on their health status and specific dietary needs.
- 4.0 Obtain alliances with outside vendors (credit union for credit information, counseling services, etc.) which could be a resource for employees.
- 5.0 Develop a quarterly schedule of humorous and light-hearted events open to employees through the Recreation and Human Resources Departments.
- 6.0 Create an employee “Healthy Lifestyle” Task Force to gain input on how to assist employees with healthier lifestyle choices.

- 4.1 Conduct a full evaluation of the current nursing home service delivery system, including all applicable departments, to ascertain opportunities and develop goals for increasing resident involvement in decision-making.
- 4.2 Review CARF standards and implement as part of resident-directed living initiatives.
- 5.1 Conduct a survey of volunteers to assess satisfaction and collect feedback.
- 5.2 Incorporate new philosophy of wellness and resident-directed living into our written volunteer recruitment plan.

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Our Strategic Focus Areas

Our Strategic Directions

Our Success Indicators

4. Talent

Moravian Hall Square must fully engage, develop and empower a well-educated workforce and recruit additional depth and strength to its leadership team for succession planning.

1. Increase emphasis on company-wide educational programs designed to attract, retain, motivate, encourage and recognize employees.
2. Attract and employ the talent necessary to accomplish the strategic plan.
3. Increase the emphasis on safety awareness and risk management programs throughout all levels of care and services.
4. Continue the focus on leadership development for all managers and supervisors with emphasis on coaching and mentoring skills.

- 1.1 Integrate a stronger company-wide focus on employee development and education through revision of the company's current performance review process and the expansion of in-house management/ leadership educational opportunities.
- 1.2 Research and recommend other benefits and programs that can be provided to staff (including wellness programs, periodic wellness physical exams and part-time benefits).
- 1.3 Develop and implement revisions to the employee retirement plan.
- 1.4 Develop and implement an employee advisor program

- for all newly hired employees to increase the level of coaching and mentoring new employees receive during the first year of employment.
- 2.1 Reduce employee turnover by at least 20% as compared to previous 12-month period.
 - 2.2 Expand company pay grade matrix to create additional career ladder steps for exempt and non-exempt employees to help enable further career development.
 - 3.0 Reduce the number of reported lost time and work-related injuries by 30% .
 - 4.0 Integrate Leadership Development plan into new employee performance review process.

5. Campus Improvements

Moravian Hall Square must continually upgrade existing campus housing and program amenities to better meet the needs of current residents and the expectations of prospective residents.

1. Investigate all options and possibilities for "going green" including conservation of energy and resources, recycling, product use and preservation of the environment.
2. Reassess and identify potential campus physical plant needs in order to support our strategic planning goals.
3. Develop a written plan for any programmatic and physical plant changes necessary to meet the changing expectations and needs of our overall resident population.
4. Research and develop a plan for program and potential physical plant changes to dining services for residential living and health care areas.
5. Research and develop a dining program plan for the proposed new cottage community.

- 1.1 Develop a brochure for all new residents outlining the conservation, recycling and preservation efforts in place at MHS.
- 1.2 Investigate and develop a written plan for future energy saving programs.
- 2.1 Complete new parking lot, office lobby, conference room, library and medical/ dental clinic.
- 2.2 Develop design drawings and a description of any programmatic and master plan changes and improvements.
- 3.1 Research and quantify the demand for more custom (combined) apartments.
- 3.2 Develop design plans for potential additional licensed beds based on findings of feasibility study for nursing care beds and/or rehab beds.

- 4.1 Develop concept menus for revised health care and personal care dining programs and, based upon proposed changes, develop design drawings for physical plant changes.
- 4.2 Develop design drawings and a description of programmatic and physical plant improvements for changes to the Rose Inn dining room.
- 5.0 Develop focus groups for determining the interests and requirements of the dining program for prospective residents of the cottage community.

6. Technology

Moravian Hall Square must integrate and embrace the advantages and efficiencies provided by new technologies throughout the organization.

1. Research and develop written short-term and long-term business plans which will identify needed technology and management information systems for various departments in order to enhance quality of life and increase operational efficiency and effectiveness.
2. Develop implementation plans for the technology, communication, and management information system improvements which have been identified as necessary to enhance quality of life and increase operational efficiency and effectiveness.
3. Research technology-based assistive and supportive devices for residents to foster greater independence and well-being.

- 1.1 Expand the focus of the Technology and Communications Committee to include its involvement in the research and development of short-term and long-term plans and the prioritization of new technologies and management information systems.
- 1.2 Update the existing Technology Plan to address Moravian Hall Square's business needs.
- 2.1 Implement new financial and clinical software systems.
- 2.2 Implement ePrescribe and eMAR for health care areas as may be required.
- 2.3 Implement a voice-activated, hands-free point of care documentation and communication system as may be required in health care areas.
- 2.4 Implement a direct, automated process for billing Medicare Parts A and B and Medicaid claims.
- 2.5 Recommend and implement a Human Resources Information System (HRIS) in order to increase the efficiencies of human resources processes.

- 2.6 Implement a corporate document management solution applicable to all departments.
- 2.7 Implement wireless and mobile technology solutions for Moravian Hall Square workforce.
- 3.0 Develop a written plan and recommendations for the implementation of appropriate technology-based assistive and supportive devices for all residential areas including cottages.