

MORAVIAN HALL SQUARE  
**Strategic Plan**

2009-2013



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## Our Core Purpose

Enriching 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 embrace diversity and our Moravian heritage.
6. We encourage innovation and learning.

## 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 thankfully long gone. The alms houses, widows’ and orphans’ homes, asylums, and sanitariums over the last 150 years gave way to rest homes, nursing homes, high-rise HUD apartments, home health care, meals-on-wheels, CCRCs, life care, continuing care, personal care, and adult day care programs. Now another language, reflective of an emerging new era, is occurring all around the country: home and community-based services, home care, culture change, ‘green homes’ and household model nursing homes, assisted living, active older adult communities, and village-model or multi-age communities are all descriptors of new models of elder care in the U.S.

Today, much of what we do in long term care can still sound very clinical and corporate. Everybody is a ‘certified’ something or a ‘vice-president’ of this or that or a ‘chief’ of something. We have ‘holding companies’ and ‘subsidiaries’, clinical ‘outcomes’, ‘corporate compliance’, and of course, ‘strategic planning’. It’s true that the widows’ and orphans’ homes of the past have come a long way with today’s organizations embracing innovation in ministries committed to continuous change for the betterment of those served. However, true transformative change where the entire organization’s culture from top to bottom is challenged and re-thought represents a whole new era in elder care. Moravian Hall Square’s own culture transformation has begun. We hope what will emerge over time is a community that ‘feels more like home’ – a place where care and services are provided seamlessly in multiple care levels by cohesive but independent staff teams who empower residents and families with choice and active participation in day to day living decisions.

Even in its 22nd year of operation, Moravian Hall Square still remains devoted to its mission to honor the unique value of each individual older adult whom it serves. Through years of faithful planning, our strategic directions and action plans have changed and will continue to do so. But, our organizational values and core purpose – enriching the lives of all those we touch – remain just as real today as they did when we first opened our doors in 1988.

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 and transformation, compassionate care, and our passion for service, we can and do make possible many invincible summers today and in the future.

Best regards,

*Susan C. Drabic*

**Susan C. Drabic**  
*President and CEO*

# Moravian Hall Square Strategic Plan: 2009-2013

## Our Strategic Focus Areas

## Our Strategic Directions

## Our Success Indicators

### 1. Growth

Moravian Hall Square must expand its programs, review service packages, residential housing capacity and amenities to remain financially healthy and competitive.

1. Respond to consumer demand for a broader range of housing choices for senior adults.
2. Merge and grow the Resident Health and Wellness (apartment home care) program into a licensed home care agency serving both MHS residents and the local community.
3. Research and identify additional and creative ways to generate increased net 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 multi-year fund raising growth plan for the Resource Development Office to include plans for a capital campaign, growth in annual contributions, the development of new planned giving opportunities, and the establishment of the MHS charitable foundation.
6. Develop a comprehensive, phased “repositioning plan” for Bethany House personal care which will also include a full assessment of the impact of the culture change initiative upon both personal care as well nursing care – since both levels of care are currently housed in the same building.
7. Develop a written assessment which addresses the potential feasibility of adding a new, state-licensed, assisted living program to Moravian Hall Square’s continuum.

- 1.0 Break ground for the first phase of the new residential cottage campus (Heritage Village).
- 2.0 Complete feasibility study and new corporation paperwork on home care agency purchase or start up.
- 3.1 Conduct a competitive bidding process for the management of the Moravian Hall Square investment portfolio account.
- 3.2 Improve average community occupancy to 95%.
- 3.3 Design and complete a comprehensive survey of local business professionals and organizations to determine the scope of and type of need for expanded catering services.
- 3.4 Complete a comprehensive assessment regarding the feasibility of establishing a Moravian Hall Square owned in-house and/or out-patient therapy program.
- 3.5 Increase net revenues by 10% based on the assumption that more residential units will be operational.
- 4.0 Proceed with joining the CARE self-insurance pool with other CCRC communities.

- 5.1 Kick off “Capital Campaign for Residential Apartment Enhancements”.
- 5.2 Develop at least two NEW planned giving strategies to enhance giving opportunities.
- 5.3 Develop a detailed, project work plan for the formation of our own foundation (to be launched when total charitable fund asset values reach \$1M).
- 5.4 Develop and launch an earnings spending plan for the Good Samaritan Endowment Fund (when fund assets reach \$1M).
- 6.0 Complete multi-year, written project plan including design plan and financial feasibility in conjunction with the personal care and nursing care re-positioning project.
- 7.0 Conduct a feasibility study to address and assess the issues related to providing a licensed assisted living level of care.

### 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.

1. Continue to develop, promote and implement new and innovative strategies related to resident and employee wellness.
2. Position the wellness program as a 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. Develop and implement a new tobacco-free community policy and related procedures to transition the campus into a tobacco-free community in all areas applicable to all NEW residents and to all current and new employees.
5. Enhance programming to continue bringing humor into the workplace.
6. Enhance educational opportunities for residents and staff to embrace healthier lifestyles.
7. Expand the philosophy of ‘health care’ at Moravian Hall Square to include action plans to most appropriately address the reduction of medications (prescription and OTC) prescribed for residents who live in nursing care and personal care areas.

- 1.1 Implement the new web-based “Collage” assessment software and integrate the various wellness assessment reports into the programs and services of residential living.
- 1.2 The Wellness & Vitality “Dream Team” (with its six subgroups - physical, social, spiritual, psychological, nutritional, and vocational) will be incorporated into the culture change process.
- 2.1 Create increased awareness of MHS wellness programs through advertising media including web-based advertising, news releases, collaterals, newspaper story placements, and special events.
- 2.2 Implement employee wellness assessment program in conjunction with local health care provider or insurer.
- 3.1 Develop an expanded ‘all day’ dining program and menu options for personal care dining.

- 3.2 Develop focus groups for determining the interests and requirements of the dining program for prospective residents of the cottage community.
- 3.3 Complete a written dining plan proposal for Heritage Village.
- 4.0 Fully implement the new tobacco-free community policies, procedures, and educational benefits program.
- 5.0 Develop and implement two NEW on-going programs for residents and employees which emphasize and promote the benefits of humor as part of healthy living.
- 6.0 Develop an on-going weight management program (to be offered at least annually) to residents and employees.
- 7.0 Develop a comprehensive, written work plan to reduce the quantity of prescription and OTC medications being prescribed and administered at Moravian Hall Square.

### 3. Culture Change Transformation

Moravian Hall Square must transform its health care culture into smaller, less clinical and more home-like settings where empowered, integrated staff teams proactively support resident and family involvement in all decision-making.

1. Develop a multi-year, comprehensive work plan for organizational transformation and culture change involving all departments.
2. Develop and implement a comprehensive dementia care program in the nursing care neighborhoods.
3. Enhance the ‘quality of living’ for our nursing care residents by implementing practices by all departments that allow more choice, less clinical intervention and more decision making opportunities.

- 1.1 Develop written program goals, timelines and budget impact of the culture change and resident-directed living initiatives.
- 1.2 Launch the culture change transformation journey in Galilee House by establishing self directed teams, resident-directed choices, versatile workers and a changed organizational chart.
- 1.3 Begin phasing in self-directed work teams, ‘Learning Circles’, and integrated activities into some of the personal care and nursing care neighborhoods.
- 1.4 Partner with the Human Resources Dept. to offer specialized, “culture change” training to all impacted employees and offer opportunities to observe the Galilee House culture change project.
- 1.5 Require key representatives from all departments to visit other communities which are in various phases of culture change transformation.

- 2.1 Work with consultant to create the new dementia care program model in the licensed nursing care environment, including behavior management plans for all residents that have a dementia diagnosis.
- 2.2 “Community Care Teams” will be utilized to enhance resident engagement for those residents that have a dementia diagnosis.
- 3.1 Review CARF standards and implement as part of resident-directed living initiatives.
- 3.2 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. Adapt systems and policies to incorporate culture change philosophy.
- 3.3 Conduct extensive interviews with residents and families to determine their preferences regarding their ADL’s.

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### 4. Talent

Moravian Hall Square must fully engage, develop, and empower its work force to competitively position the community: For culture change transformation in all health care areas; for the advances in technology in all departments, and for the increased demand for leadership skills at all levels of the organization.

1. Reassess what is viewed as a competitive compensation and benefits structure that will attract and retain a fully engaged and highly accomplished workforce.
2. Develop programs and systems to increase emphasis on safety awareness and the reduction of employee turnover.
3. Continue the focus on leadership development for all supervisory staff.
4. Increase community's workforce diversity and improve understanding and inclusivity among co-workers and residents relative to minority population biases.
5. Create "Learning Circle" and other opportunities for employees to share their experiences, challenges, and new ideas related to the growing pains associated with the departmental and organizational restructuring which culture change transformation will demand.
6. Evaluate the effectiveness of the current volunteer program and seek out new opportunities for growth in volunteer services.

- 1.1 Develop and implement a revised employee retirement plan through conversion to a 401(k) structure for retirement contributions benefits.
- 1.2 Expand company pay grade matrix to add additional career ladder steps for exempt and non-exempt employees to enable further career development paths.
- 1.3 Research and recommend additional employee compensation and benefits programs, with a specific focus on part-time staff.
- 1.4 Research and recommend a revised company wage administration plan to create additional options to reward highly accomplished employees.
- 2.1 Reduce the number of reported lost time and work-related injuries in 2010 by 20% as compared to 2009.
- 2.2 Reduce employee turnover by 20% over the previous twelve month period.
- 3.1 Re-evaluate the employee advisor program.
- 3.2 Perform a follow-up review of the Employee Development

- Plan process to assess target goal effectiveness.
- 3.3 Work with the IT Department to streamline the Employee Development Plan software and process.
- 4.1 Develop 'MHS University' new supervisor and manager orientation training program.
- 4.2 Expand employee participation on the Diversity Committee and develop additional program presentations to increase employee awareness of the committee's mission and vision.
- 5.0 Work with other leadership team members to develop a comprehensive plan for employee development and training for all departments, which supports the culture change transformation initiative over the next three to five years.
- 6.1 Conduct a survey of volunteers to assess satisfaction and collect feedback.
- 6.2 Incorporate new philosophy of wellness and resident-directed living into MHS volunteer program.

### 5. Campus Improvements

Moravian Hall Square must continually upgrade existing campus housing and program amenities to better meet the needs of current residents and prospective residents in a manner consistent with resident expectations, environmental sustainability and responsible fiscal stewardship.

1. Continue investigation of all appropriate options for "going green", including conservation of energy and resources, recycling, product purchases, and preservation of the outdoor environment.
2. Research all feasible options for sustainability and energy conservation as a goal for campus capital improvement projects, both new construction and renovations.
3. Proactively manage all scheduled planned capital improvement projects so as to meet budget and timing deadlines.
4. Actively participate in the personal care and nursing care "re-positioning" project work group process.
5. Reassess current and identify potential new physical plant needs for the Moravian Hall Square campus in the form of a detailed, revised master campus plan.
6. Participate in a work group to research and develop plans for programmatic and physical plant changes to the current residential living dining services program.

- 1.1 Publish a new brochure which outlines the conservation, recycling and preservation efforts in progress at MHS.
- 1.2 Investigate and develop a written plan for future energy saving programs.
- 2.1 Research and develop a written procedure for evaluating possibilities for sustainability and energy conservation for every capital improvement project.
- 2.2 Develop a written physical plant assessment for every room/area in the facility including current equipment and features as well as future renovations and improvements.
- 3.0 Complete planning and construction of new main lobby, business office/conference room, library/game room/covered entrance and medical/dental clinic.
- 4.0 Work with members of the leadership team and outside consultants to develop a written project plan for the

- multi-year program re-positioning and potential renovations to the health care building which houses both personal care and nursing care.
- 5.1 Research and quantify the demand for more custom (combined) apartments.
- 5.2 Develop design concepts and a written description of Moravian Hall Square Master Plan changes.
- 5.3 Develop a written technology plan in conjunction with the IT Dept. which addresses technology needs (software and hardware) related to the physical plant, i.e. fire alarm systems, emergency call systems, two-way radio, cable and telephone systems, preventive maintenance programs, etc.
- 6.0 Develop design drawings and a description of programmatic and physical plant improvements to the residential living dining program.

### 6. Technology and Communications

Moravian Hall Square must proactively research and fully prepare and engage our workforce to utilize and embrace the advantages and efficiencies provided by new technology throughout the community.

1. Research and develop plans to implement SMART HOME technology in campus facilities.
2. Research and implement new web-based technologies including social networking and intranet services for the purposes of increasing brand awareness, sales leads, and appropriate constituent access to information.
3. Research, identify, and implement the technology, communication, and management information system improvements which are necessary to enhance quality of life, to increase operational efficiency and effectiveness and to beat the challenges of increased competition.
4. Research technology-based assistive and supportive devices for residents to foster greater independence and well-being.

- 1.0 Develop written SMART HOME technology recommendations for Heritage Village.
- 2.0 Develop and implement policies and procedures for a community social networking site and intranet (internal) website.
- 3.1 Implement ePrescribe, eMAR and physicians' orders software for nursing care and personal care areas.
- 3.2 Fully implement computer-based training applications for employee training.
- 3.3 Complete residential living, personal care and nursing wireless internet access options for residents and guests including publishing policies, procedures and pricing.
- 3.4 Recommend and implement a Human Resources Information System (HRIS) in order to increase the efficiencies of HR processes.

- 3.5 Implement voice-activated, hands-free point of care documentation and communication systems as may be required in health care areas.
- 3.6 Implement a corporate document management solution applicable to all departments.
- 3.7 Implement wireless and mobile technology solutions for the Moravian Hall Square workforce.
- 4.0 Develop a written plan and recommendations for the implementation of appropriate technology-based assistive and supportive devices for all residential areas including cottages.