



## PROGRESS REPORT ON INTERIM CEO'S 2020 WORKING GOALS

November, 2020

### GOAL 1: Response to COVID-19

- a. We will conduct our 12<sup>th</sup> & 13<sup>th</sup> rounds of weekly testing of Health Center staff on Nov 12-13 & Nov 19-20. Monthly testing of other staff will be on Nov 23-24. We will adjust testing times for Nov & Dec holidays.
- b. We are on track to re-open dining room for lunch & dinner on Nov 17, per the weekly update you have been receiving. Other resumed activities reported in the weekly are going well, with few hiccups.

### GOAL 2: Planning for Post COVID-19 Surge

- a. *Financial*: Staff reported its projection of financials at the Aug BOD meeting. We will continue to track.
- b. *Marketing plan*: The executive summary was included in the Oct staff report to the BOD. The marketing plan will continue to be held in abeyance pending resolution of strategic discussions.
- c. *Second wave preparation*: See Goal 1 above.
- d. *Review of emergency plan*: Work has begun. Hanh will continue to work w/consultant Ray Boudewyn.
- e. *Apartment conversions*: The apartment conversion governing policy will continue to be held in abeyance pending resolution of strategic discussions.

### GOAL 3: Transition to Permanent CEO/Executive Director

- a. *Staff development*: Executive team job evaluations will be done in early Dec. Because of the pandemic, they will be a modified evaluation, and they will be included in the transition packet (Goal 3c).
- b. *BOD evolution*: The standing agenda item was completed at the Aug BOD meeting. Subsequent sessions will be ad hoc.
- c. *Specific transition plan*: Development of a CEO/ED turnover file has started with tentative completion target of Jan 15.

### INCIDENTAL

- a. A summary of the 2020 Resident and Team Member (Employee) Satisfaction Surveys follow on p.2ff.
- b. The Friendship Hall acoustical work, the final piece to a project interrupted by the pandemic, was completed on Nov 2. A "sound test" w/residents will be scheduled for later this month.

Summary of 2020 Satisfaction Survey follow on the next page.

PREFACE TO SATISFACTION REPORT SUMMARY 2020

Overall results for both resident & employee surveys were good. Satisfaction level for the key questions (see following pages) were very close to peer group benchmarks.

I found the results very difficult to interpret for two reasons: the sample size was small (sometimes exceedingly small) and pandemic restrictions changed the nature of operations and therefore resident and employee responses significantly. We therefore chose our initial quality improvement targets on what was suggested by the survey but corroborated by corporate staff assessment: response to resident concerns (residents) and the orientation program (employees).

MM 11/2020

SUMMARY RESULTS OF RESIDENT SATISFACTION SURVEY  
July, 2020

Key Results	Health Center	Assisted	Independent
Response rate	14 of 22 – 64%	8 of 22 - 36%	54 of 66 – 82%
Recommendation to Others / Peer Grp	82% / 86%	100% / 90%	90% / 91%
Overall Satisfaction / Peer Grp	83% / 87%	100% / 91%	92% / 92%

High-level Analysis: Overall, the key results are comparable to HOTM’s peer group – slightly lower in Health Center, slightly better in Assisted Living (but with a very small sample size), and almost identical in Independent Living.

“Priority Action Opportunities” – are areas that statistically correlate to the key results of Recommendation to Others and Overall Satisfaction; i.e., doing poorly or well in these correlate to doing poorly or well in the key results.

Health Center	HOTM	Peer	Explanation
Quality of laundry services	61	73	This usually means missing clothing, but this does not seem to be true. Needs monitoring.
Responsiveness of management	67	72	<b>A priority focus for managers &amp; executives</b>
Security of personal belongings	69	76	No rise in loss/theft reports; needs monitoring.
Quality of dining	60	66	Difficult to judge b/c of COVID-19
Care (concern) of staff	70	76	Difficult to judge but bears close monitoring

Assisted Living	HOTM	Peer	Explanation
Variety of meals	71	68	Better than peers despite COVID-19
Accuracy of bills	71	76	Billing doesn’t appear to have major issues
Appeal of food	71	66	Better than peers despite COVID-19
“Grow as a person” opportunities	71	70	Difficult to judge w/COVID-19 restrictions
Quality of laundry	63	75	This usually means missing clothing, but this does not seem to be true. Needs monitoring.

Independent Living	HOTM	Peer	Explanation
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Sufficiency of dietary needs	70	62	Better than peers despite COVID-19
Variety of meals	70	64	Better than peers despite COVID-19
Responsiveness of management	72	69	Slightly better than peers despite COVID-19
Sufficiency of personal assistance	80	79	At peer level despite COVID-19
Religious/spiritual opportunities	75	80	Difficult to judge w/COVID-19 restrictions

*Because there were no clear-cut areas of need, how managers and executive respond to residents has been selected as our first focus area.*

## SUMMARY RESULTS OF EMPLOYEE SATISFACTION SURVEY July, 2020

Key Results	Health Center	Assisted	Independent
Response rate	21 of 50 – 42%	17 of 32 – 53%	19 of 38 – 50%
Overall Satisfaction / Peer Grp	90% / 73%	88% / 76%	79% / 83%
Recommendation for Job / Peer Grp	86% / 73%	88% / 76%	79% / 81 %
Recommendation for Care / Peer Grp	95% / 78%	94% / 83%	89% / 86%

High-level Analysis: Overall ratings for key results are above the peer group in Health Center and Assisted Living, and slightly below or slightly above peer group in Independent Living. Overall response rate of <50% is cause for concern. It makes interpreting results difficult because of small sample size, which adds to uncertainties caused by COVID-19. The low response rate may suggest a workforce that is not as engaged with management as we would like and needs on-going monitoring and analysis.

“Priority Action Opportunities” – are areas that statistically correlate to the key results of Recommendation to Others and Overall Satisfaction; i.e., doing poorly or well in these correlate to doing poorly or well in the key results.

Health Center	HOTM	Peer	Explanation
Quality of family-related training	63	59	Better than peers but needs monitoring
Assistance w/job stress	65	54	Much better than peers but needs monitoring
Quality of resident-related training	73	63	Much better than peers but needs monitoring
Quality of orientation	70	67	<b>A priority focus for directors &amp; managers</b>

Assisted Living	HOTM	Peer	Explanation
Staff-to-staff communications	61	57	Better than peers but always a key area
Fairness of evaluations	65	69	Difficult to judge b/c of COVID-19
Clear expectations by management	65	68	Difficult to judge b/c of COVID-19

Independent Living	HOTM	Peer	Explanation
Assistance w/job stress	40	59	High spread, but difficult to judge b/c of COVID-19

Quality of skill training	42	63	High spread, but difficult to judge b/c of COVID-19
Attentiveness of management	58	63	Difficult to judge but bears close monitoring
Support of career	44	67	High spread, but difficult to judge b/c of COVID-19
Care (concern) of management	63	68	Difficult to judge but bears close monitoring

***Note: while it did not make “priority action opportunities” for AL and IL, the quality of orientation was among the lower scored areas in assisted living and independent living so we have made it our initial focus area for quality improvement.***