

	Indicators
Quality Performance	
Satisfaction ratings	Every other year staff satisfaction survey
	Admin/resident team to improve measures based on survey results
Regulatory surveys	CDPH, RCFE, DSS, Life Safety, Infection focused, NHPPD
	Self-reported events
	Complaint visits
Aging in Place	Move SNF staffing to RCFE
	Fee schedule for AIP services
	Dementia support on site
	Communication/talking points
	SNF closure
Financial Strength	
Add revenue generating square footage	Concept Plan development/Rockwood Pacific
	Implement Strategic Plan
Cost saving/expense	FTE position control
	Departmental expenses/controls

Cost saving/expense reduction	Other: PGE, Morrison, etc.
Financial accountability	Monthly DD variance reports
	DD financial training
	DD involvement with budget preparations
Market Relevance	
Resident Experience	Unify campus buildings and style (halls, lighting, paint, furniture, etc)
	Amenity spaces: beauty shop, fitness center, shared kitchens, post office, art room, laundry rooms
IL Occupancy	Target Marketing benchmarks per month
	CRM tool management
	Marketing Assessment
	Training for Marketing team
Brand Distinction	Marketing Assessment
	Social Media presence
	Website
	Community outreach
Organizational Effectiveness	
Employee satisfaction/engagement	Employee satisfaction/engagement survey every other year
	Admin/staff team to improve measures based on survey results
	Minimum quarterly staff engagement events
Key Foundational	Payroll/scheduling software

Key Foundational Systems	Recruitment/hiring platform
	Budget software
	Technology master plan
Departmental Quality Metrics	Regulatory compliance is a minimum standard
	Financial goals
	Create just culture

Update December 2021

Currently working with Vital Research to customize our surveys. Expect resident survey to go live in late January.

Awaiting survey results.

No new surveys this month.

None

None.

RHSD job posted x 2 months; no qualified candidates. May consider in-house candidate. AIP Plan of Operations written and being used to teach staff. Working to bring outside consultant in to train staff.

In place since July 1, 2021

Re-started Cottage Memory Day Program. Currently 4-6 residents in IL and AL participate. Program is staffed by one Activities Assistant and one Certified Nursing Assistant. Currently writing a Plan of Operations for the program.

Working with Singer monthly.

Expecting to announce closure in June 2022, with the expectation that SNF will be fully vacated by end of year. RCFE license has been amended to increased hospice beds from 2 to 5 and to increase non-ambulatory residents from 22 to 40. All residents being assessed (baseline now and annually on going) to determine ambulatory status for our Fire Department.

Weekly work with Rockwood Pacific and Executive Team to build the concept plan and business model. RFP for architect completed and HKS chosen. RFP for Land Use Attorney in process.

Concept Planning currently, as above.

Completed July 1, 2021. Budget 2022 completed and approved by Financial Committee of BOD.

Working monthly with Directors

PGE Care contract signed. Unable to lock in new prices with Waste Mgmt until after strategic plan when a new compactor can be installed. Morrison Front of House transition on hold, but prices locked through April 1, 2022.

Not yet. Need staff in accounting. Job Description for new Budget Analyst position written and job is posted.

Considering PT Budget Analyst position

Controller and CEO met with each DD to plan FTE/wages and department expenses.

Bids obtained and submitted in 2022 capital budget. HKS engaged to assist with these near-term plans.

Budgeted in capital budget 2022: 1st floor campus unification, fitness center.

Callouts to database 14/day; 3 tours/week; 1 marketing event/month; 2 community outreaches monthly;

Team is using the CRM tool as designed.

Completed 9/14/21

Bild & Co training completed October, November, December 2021.

completed 9/14/21

Increased Facebook posts

Lawsuit (\$4K settlement) r/t not accessible to visually impaired. Corrected 9/21. Will change website company in new year to one who specializes in senior communities.

Monthly webinars restarted. Considering offsite meetings at local restaurants until COVID regs allow onsite visits.

Vital Research chosen as our survey vendor after RFP. Working with them to customize our surveys. Expect resident survey to be in place by end of January 2022.

Will begin once a survey date is determined

Beginning in January 2022 will have monthly all-staff meetings. Will develop staff engagement team.

Paychex is unable to meet our needs r/t CaMP so will RFP for new payroll platform.

Praveen to evaluate.
New Budget Analyst position will address.
Build into Strategic Plan.
Strong QAPI program in place.
New Budget Analyst position will work with each DD to develop financial accountability.
Working with Eteam and Director of Ops to promote.