Innovative and Sustainable Technology Planning for Senior Living
MARCH 29, 2017

AGENDA

- Introductions
- About RiverWoods
- Why RiverWoods Undertook this effort
- Planning Process
- Strategy
- Technology Trends
- Wrap Up

ABOUT RIVERWOODS

LIFE PLAN COMMUNITY	EXETER CAMPUSES	PARENT	"SISTER" COMMUNITY
	1. The Woods (1994) 2. The Ridge (2004) 3. The Boulders (2010)	The RiverWoods Group	Birch Hill Terrace

THE RIDGE

THE WOODS

THE BOULDERS

RIVERWOODS STRATEGIC PLAN

- In 2015, RiverWoods hired a consultant to assist with strategic planning initiatives

- Board & Leadership involvement

- Create a technology road map, a living document to guide RiverWoods' community advancement for the current and next generation resident

RIVERWOODS STRATEGIC PLAN

- 21st century approach to fulfilling founders' original mission
  - Remain focused on age directed communities
  - Provide community and peace of mind
  - Evolve into a deeper and broader community resource in health and wellbeing, technology and "Community"
  - Balance "human-ness" and a fast changing, technology driven environment
  - Maintains cultural, financial and organizational strength

RIVERWOODS STRATEGIC PLAN

VISION 2030	PRIORITIZED	THIRTEEN INITIATIVES
• Innovate • Update • Thrive	Level 1, 2 or 3	Including Technology Plan • Assemble a core team • RFP to technology consultants • Engage consultant

THE PLANNING PROCESS
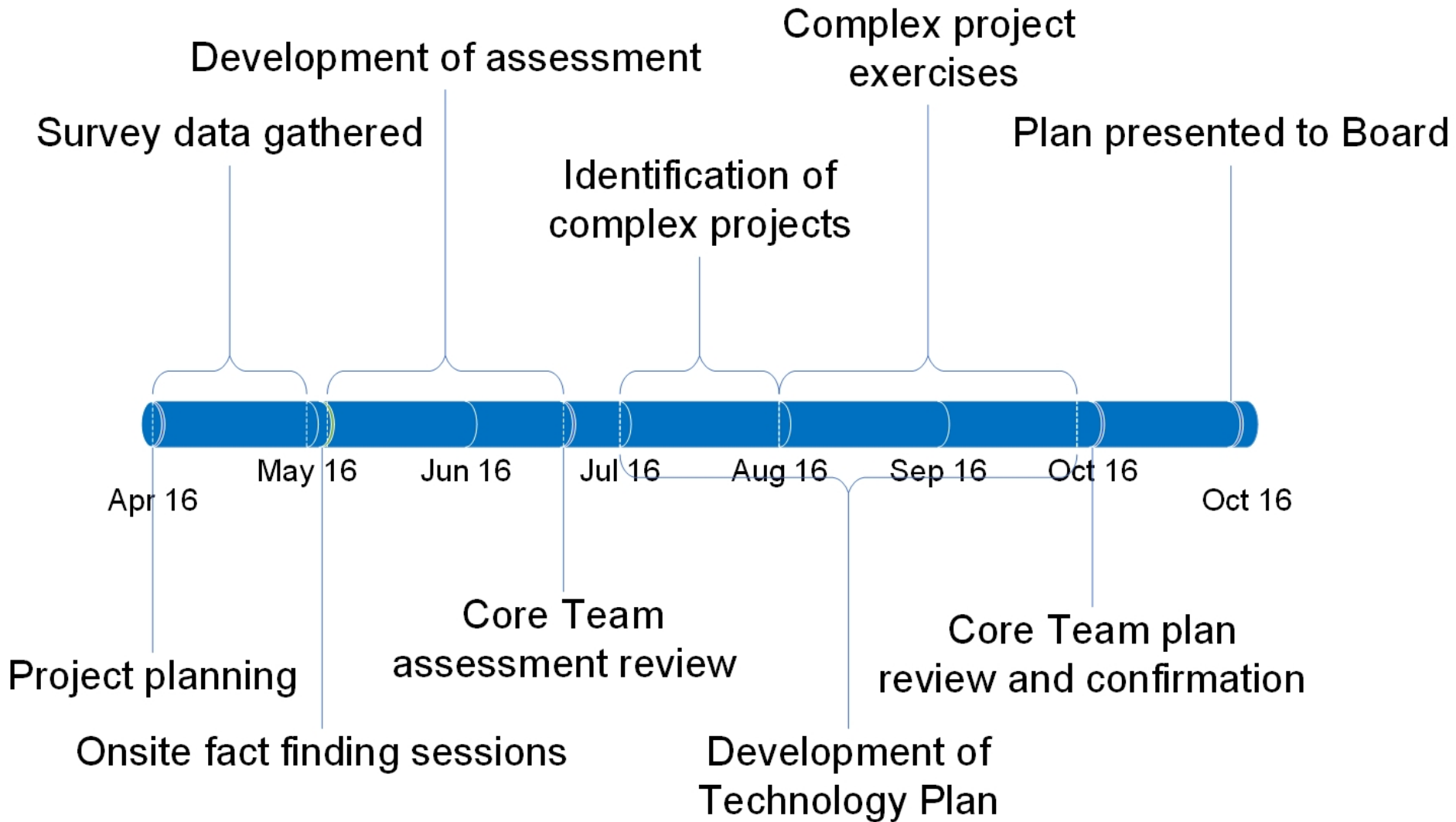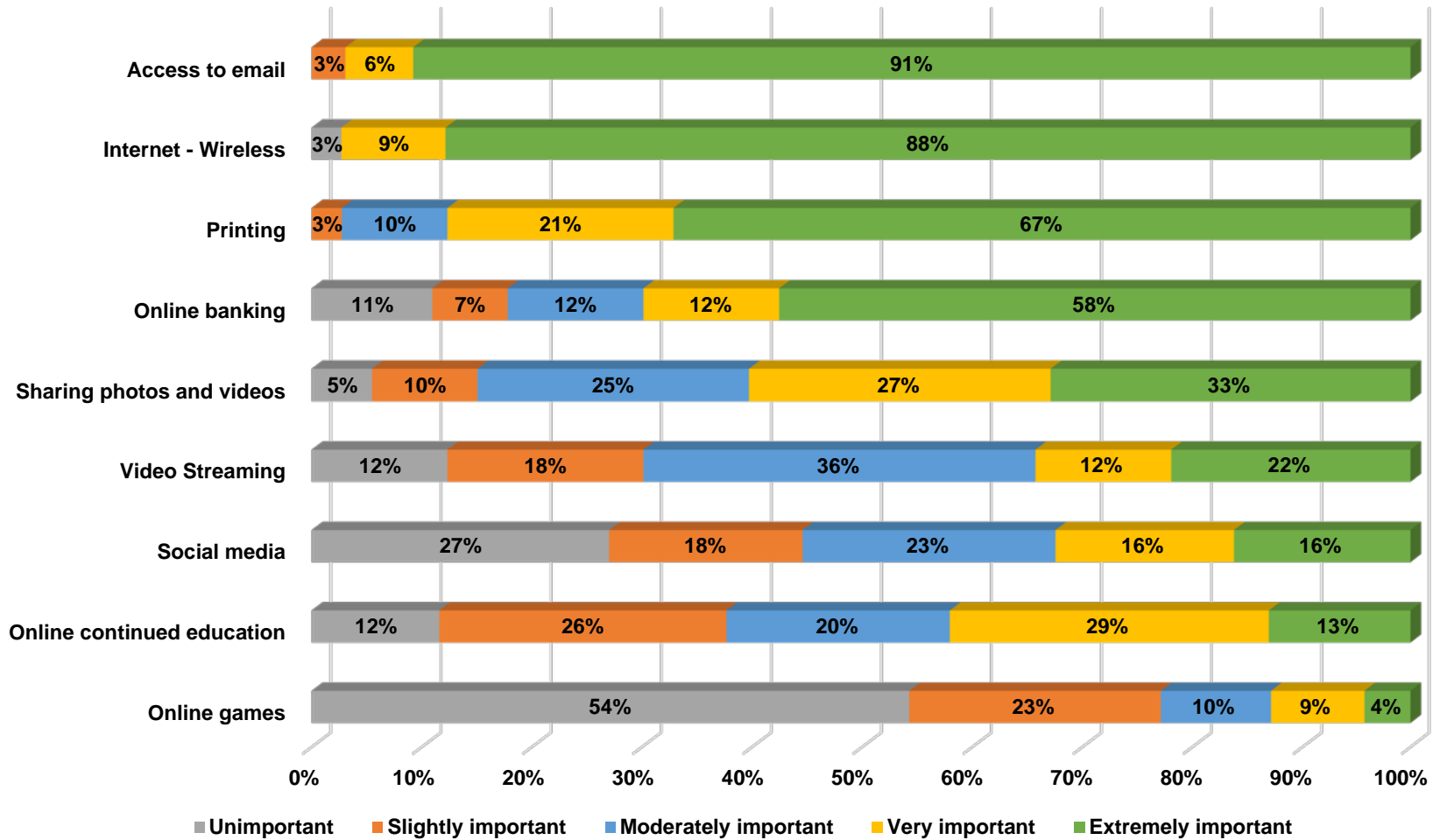
1 Planning	2 Assessment	3 Priority Setting	4 Plan Development	5 Implementation and Updates
Developed project plan	Distilled key themes from survey feedback and meetings	Core Team set priorities and ranked initiatives	Developed project profiles	Established a technology planning cycle to maintain and update the plan
Established a planning Core Team	Developed findings and recommendations	Developed a plan implementation timeline	Worked through planning of complex technology initiatives	Presented the plan to the board and elicited feedback
Collected staff, resident, and family survey responses	Reviewed and confirmed findings and recommendations	Sequenced projects over a five-year period	Established cost estimates	Created higher level groupings and measures of success
Met with staff, residents, and board members	Identified potential projects	Considered short and long term options for innovative and maturing technology	Reviewed and updated plan	Plan to update the plan annually

WHO WAS INVOLVED

EMPLOYEES	RESIDENTS	FAMILY MEMBERS	PROSPECTIVE RESIDENTS
• Senior leadership • Administrative • IT • Finance • Healthcare • Human Resources • Resident Services • Environmental Services staff	From each of RiverWoods's three campuses Resident Committees • Communication • Education • Innovation	From current resident family members via questionnaire	From prospective residents via questionnaire

PROJECT TIMELINE

Development of assessment

Complex project exercises

Survey data gathered

Plan presented to Board

Identification of complex projects

May 16   Jun 16   Jul 16   Aug 16   Sep 16   Oct 16

Apr 16

Oct 16

Project planning

Core Team assessment review

Core Team plan review and confirmation

Onsite fact finding sessions

Development of Technology Plan

WHAT INTERESTED RESIDENTS

Category	Unimportant	Slightly important	Moderately important	Very important	Extremely important
Access to email		3%		6%	91%
Internet - Wireless		3%		9%	88%
Printing		3%	10%	21%	67%
Online banking	11%	7%	12%	12%	58%
Sharing photos and videos	5%	10%	25%	27%	33%
Video Streaming	12%	18%	36%	12%	22%
Social media	27%	18%	23%	16%	16%
Online continued education	12%	26%	20%	29%	13%
Online games	54%	23%	10%	9%	4%

RESIDENTS' SHIFTING EXPECTATIONS

TECHNOLOGY INDIFFERENT

- Television
- Email
- Printing
- Landline telephone
- AM/FM radio

TECHNOLOGY CENTRIC

- Multiple mobile devices
- Video and music streaming
- Social media
- Virtual education
- Video chat
- High wireless demand

RESIDENT PREFERENCES ARE DIVERSE AND EVOLVING

The Strategy
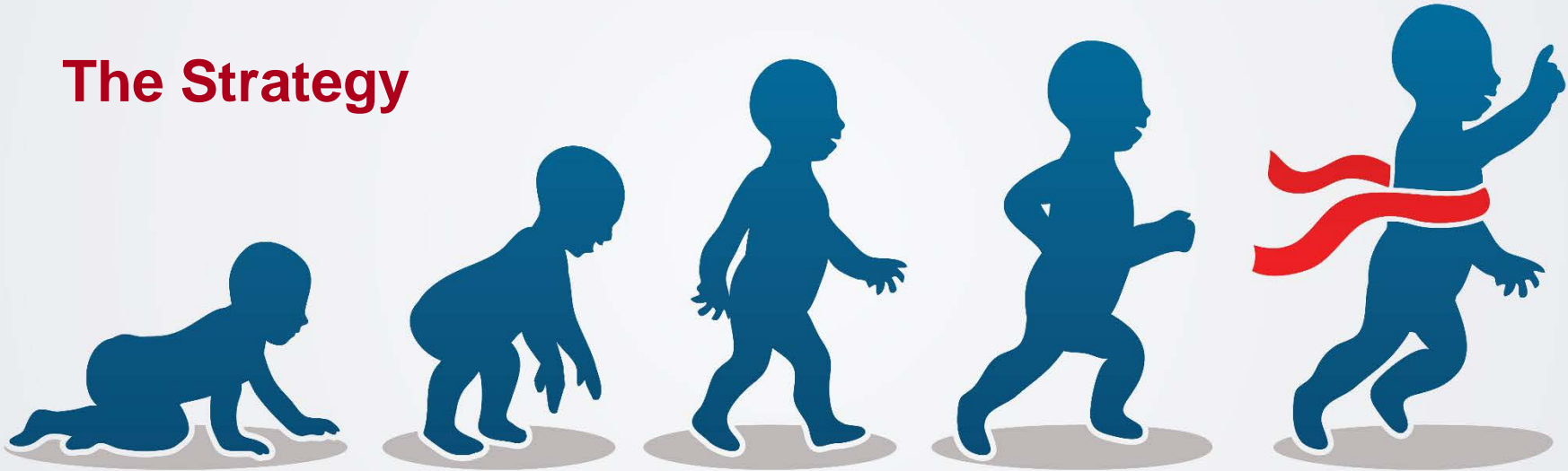
CRAWL

- 11 initiatives in first priority grouping
- Focused on foundational technology, security, safety, and backbone
- More near term focus

WALK

- 15 initiatives in second project grouping
- Focused on technologies that advance the organization, increase collaboration, automate process, or pilot innovation
- Medium term focus

RUN

- 6 initiatives in third project grouping
- Focused on emerging technologies, innovative initiatives, and forward looking projects
- Longer term focus

BOARD QUESTION - HOW DO WE MEASURE SUCCESS?

DEFINED BY GOALS:

Strengthen infrastructure/"back bone"

Harden security

Lower operating costs/ higher efficiencies

Improve resident satisfaction

Improve health care coordination & outcomes

IMPLEMENTING AND SUSTAINING THE PLAN

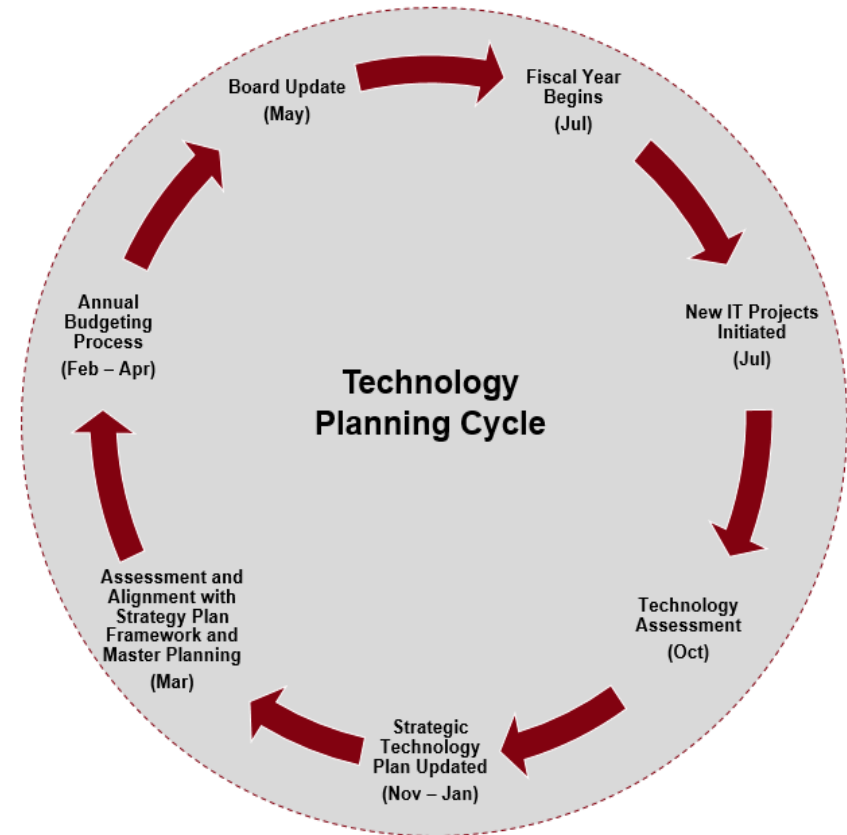Upfront buy-in from board including for the human and financial resources

Buy-in from leadership and staff by explaining the why

Transparency with residents

Annual plan revisions and updates

Semi-annual updates to board

Innovative and flexible mindset that accepts that not everything may pan out

Technology Planning Cycle

- Board Update (May)
- Fiscal Year Begins (Jul)
- New IT Projects Initiated (Jul)
- Technology Assessment (Oct)
- Strategic Technology Plan Updated (Nov – Jan)
- Assessment and Alignment with Strategy Plan Framework and Master Planning (Mar)
- Annual Budgeting Process (Feb – Apr)

MOVE TO ACTION

1. **MEETING WITH PROJECT OWNERS**
   - What are our expected outcomes?
   - Coordination of who is responsible for what and when

2. **EVALUATING INTERNAL RESOURCES**
   - Capability: Technical skills versus business skills
   - Capacity: Time / availability versus depth and breadth of contribution

3. **TIME FOR ACTION!**
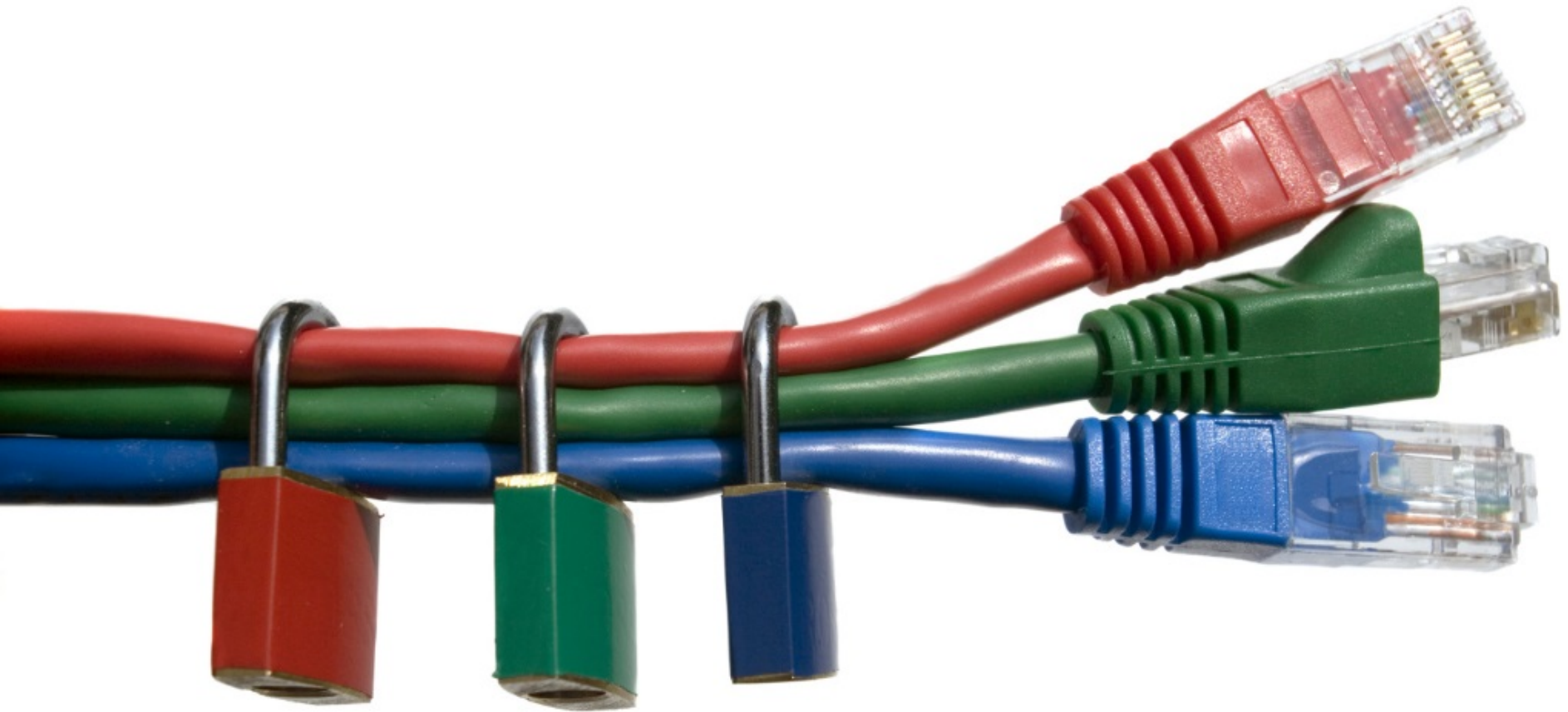
WEARABLE TECHNOLOGY

TELEHEALTH TECHNOLOGY

SMART HOME TECHNOLOGY
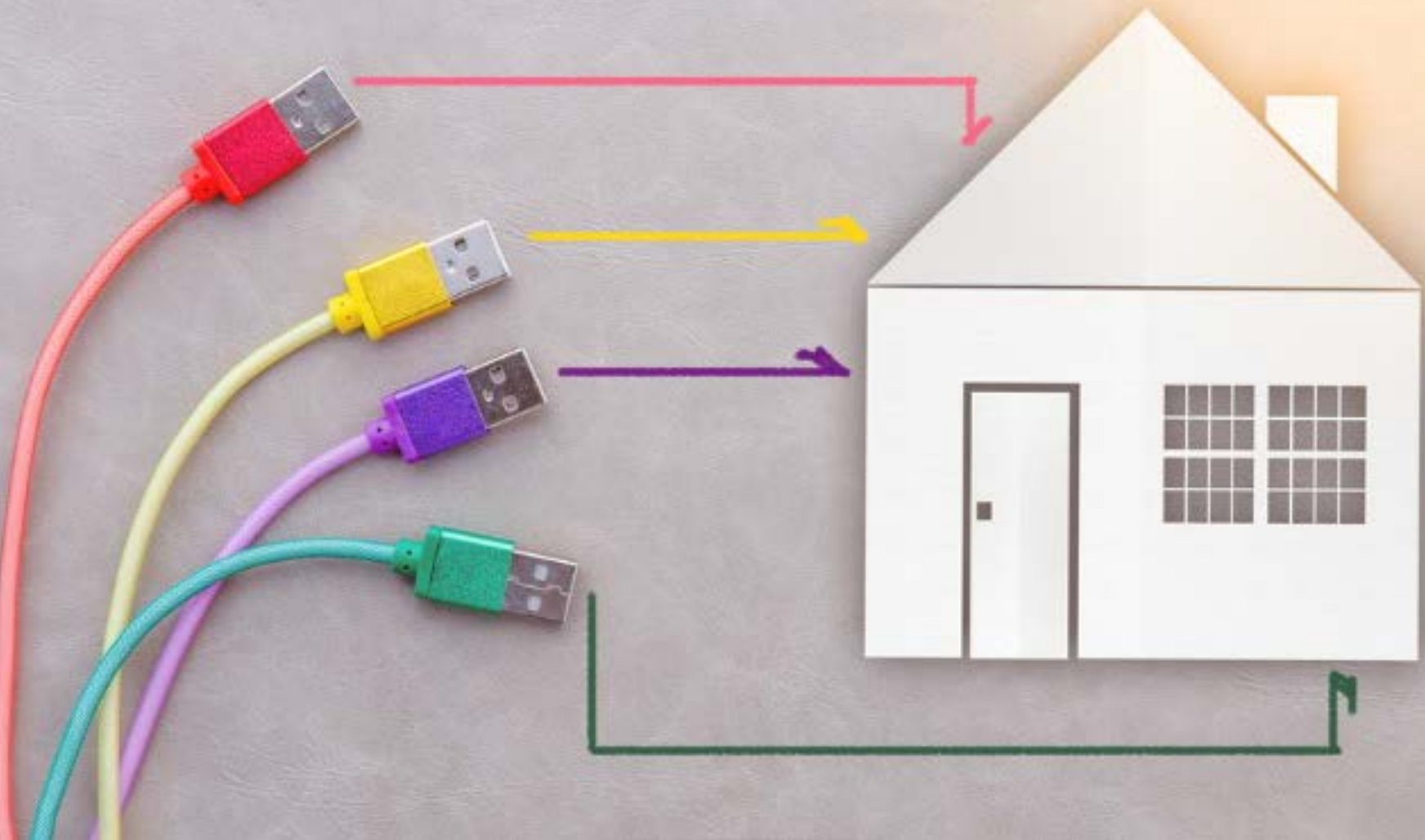
VIDEOCONFERENCE AND CHAT

AUTOMATION TECHNOLOGY

ARTIFICIAL INTELLIGENCE

LEADINGAGE RESOURCES

Strategic Planning and Strategic IT Planning for Long-Term and Post-Acute Care (LTPAC) Providers:

A "HOW TO" WORKBOOK

WORK BOOK

LeadingAge CAST
center for aging services technologies
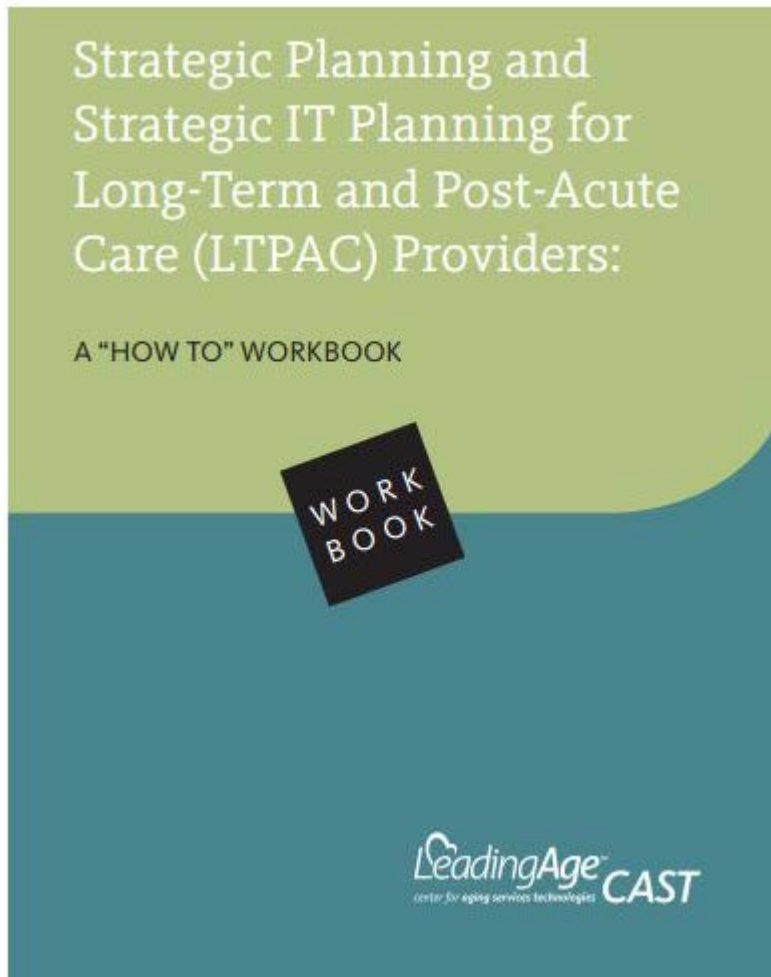
Four Components:

- Strategic IT Planning Workbook

- An interactive online tool

- Process flowcharts

- Case studies

Questions

Contact Us

Kevin Goyette, CFO
kgoyette@riverwoodsrc.org
603.658.3035

Lionel Dube, Director of IT
ldube@riverwoodsrc.org
603.658.1518

Dan Vogt, Senior Manager
dvogt@berrydunn.com
207.541.2279