

Strategic Planning To Guide Technology Initiatives

November 1, 2017



Agenda

- Introductions
- About RiverWoods
- Why RiverWoods Undertook this effort
- Planning Process
- Strategy
- A Year In – Perspective and Lessons Learned
- Technology Topics
- Wrap Up

About RiverWoods

LIFE PLAN COMMUNITY

EXETER CAMPUSES

1. The Woods (1994)
2. The Ridge (2004)
3. The Boulders (2010)

PARENT

1. The RiverWoods Group

“SISTER” COMMUNITIES

1. Birch Hill Terrace
2. RiverWoods Durham

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
<ul style="list-style-type: none">• Innovate• Update• Thrive	Level 1, 2 or 3	<p>Including Technology Plan</p> <ul style="list-style-type: none">• Assemble a core team• RFP to technology consultants• Engage consultant

1

Discovery

Developed project plan

Established a planning Core Team

Collected staff, resident, and family survey responses

Met with staff, residents, and board members

2

Analysis

Distilled key themes from survey feedback and meetings

Developed findings and recommendations

Reviewed and confirmed findings and recommendations

Identified potential projects

3

Priority Setting

Core Team set priorities and ranked initiatives

Developed a plan implementation timeline

Sequenced projects over a five-year period

Considered short and long term options for innovative and maturing technology

4

Plan Development

Developed project profiles

Worked through planning of complex technology initiatives

Established cost estimates

Reviewed and updated plan

5

Implementation and Updates

Established a technology planning cycle to maintain and update the plan

Presented the plan to the board and elicited feedback

Created higher level groupings and measures of success

Plan to update the plan annually

The Planning Process

Who was Involved

EMPLOYEES

- Senior leadership
- Administrative
- IT
- Finance
- Healthcare
- Human Resources
- Resident Services
- Environmental Services staff

RESIDENTS

From each of RiverWoods' three campuses

- Resident Committees
- Communication
 - Education
 - Innovation

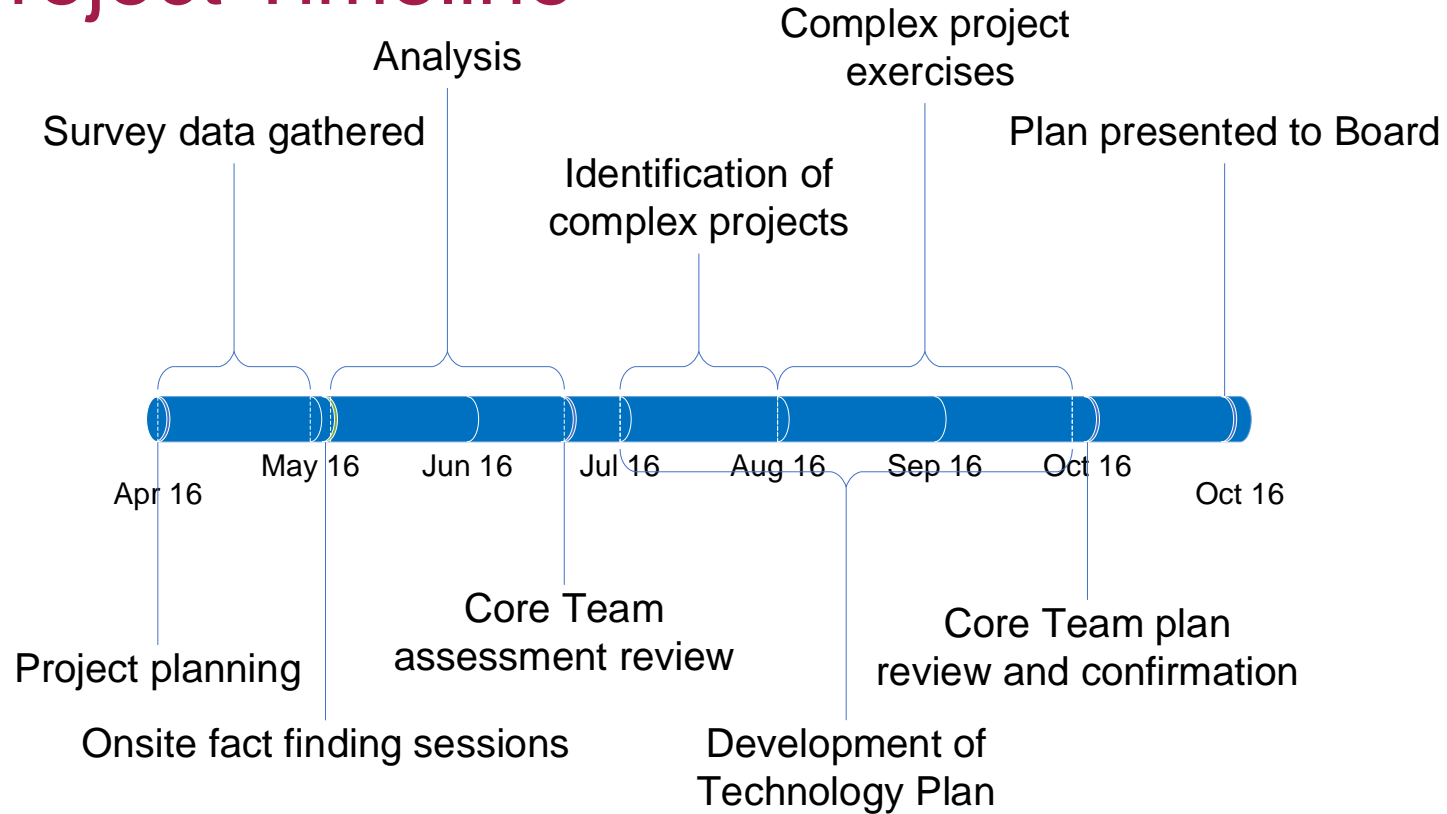
FAMILY MEMBERS

From current resident family members via questionnaire

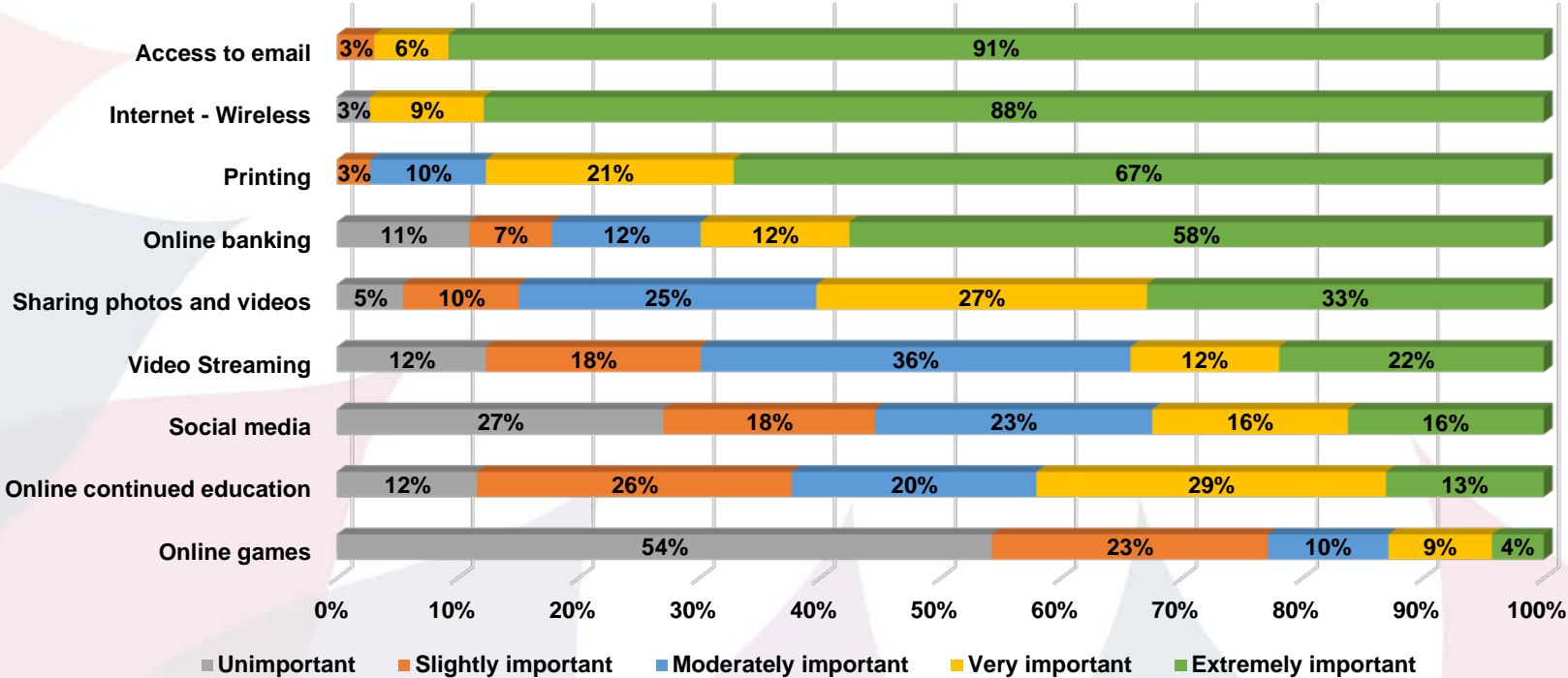
PROSPECTIVE RESIDENTS

From prospective residents via questionnaire

Project Timeline



What Interested Residents



Residents' Shifting Expectations

TECHNOLOGY INDIFFERENT

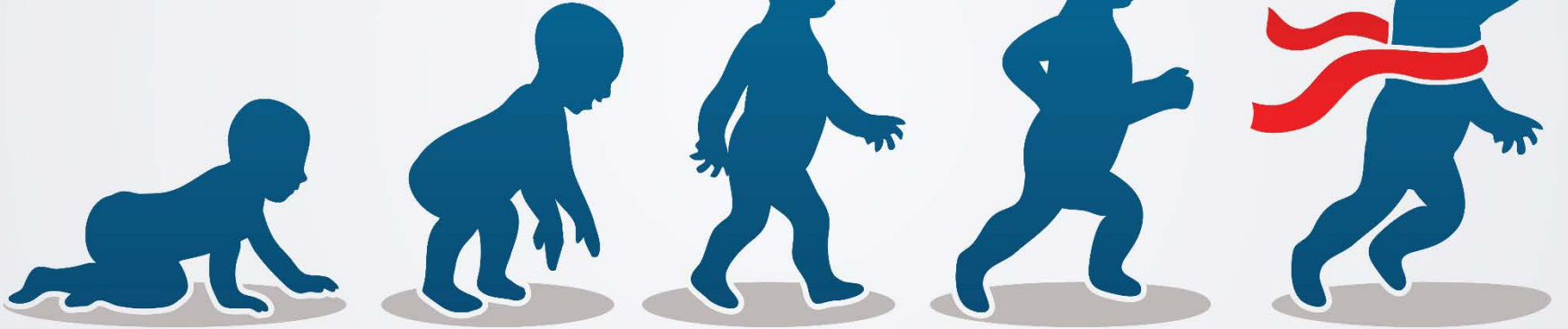
- Television
- Email
- Printing
- Landline telephone
- AM/FM radio

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



Project	Goal	FY 2017	FY 2018	FY 2019	FY 2020	FY 2021
What should RW do now	Network Infrastructure					
	Emergency Call System					
	Electronic Health Record					
	IT Security					
	Mobile Device Management					
	Enterprise Staff Scheduling Software					
	Data Protection					
	In-House Communication					
	Enterprise Email and Productivity Software					
	Resident Support Helpdesk Software					
	Resident Support Model					
	Technology Support Team Composition					
	Innovation Pilot Building					
What should RW do next	Dining Management Software					
	Optimal Software Platform					
	Server Infrastructure					
	Optimal Audiovisual Platform					
	Clinical Analyst					
	Point of Sale Software					
	Voice and Video Communication					
	TRWG Expansion					
	Staff Computers and Devices					
	IT Security Awareness & Training					
	Community Operations Software					
	IT Procedures and Documentation					
	Technology Training for Staff					
What could help RW further innovate	Workforce Automation					
	Telehealth Technology					
	Data Analytics					
	Wearable Technology					
	Webcasting					
	Physical Security Technology					

Goal Addressed:	Infrastructure / "Backbone"	Security	Lower Operating Costs / Higher Efficiencies	Improved Resident Satisfaction	Improved Health Care Coordination & Outcomes

Implementing and Sustaining the Plan

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

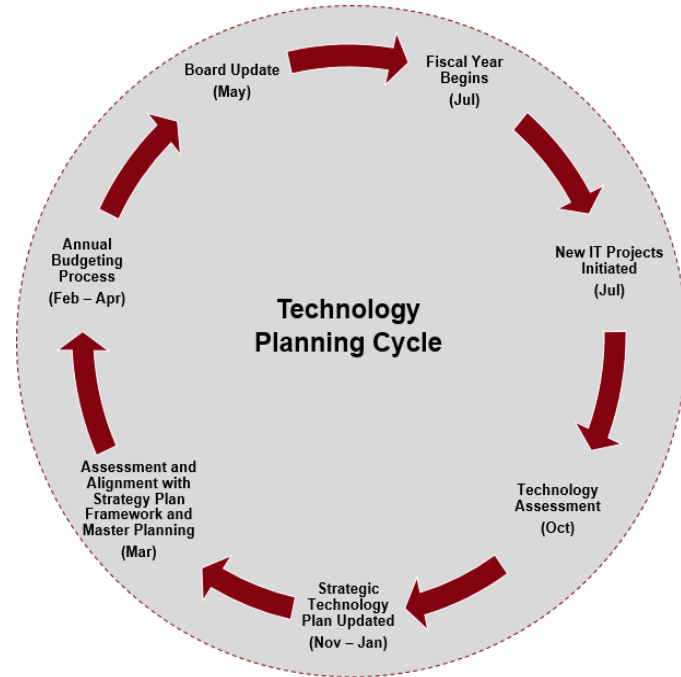
Buy-in from leadership and staff by explaining the why

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



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!

A Year Later

PERSPECTIVE AND LESSONS LEARNED

- Plan additional time and contingency
- Always be willing to listen to ideas and compare them with the overall strategy
- Be prepared to explain the plan and it's logic
- Share why some ideas don't make the plan
- Recognize the “just do it” items
- Accept that not everyone will like it

Technology Backbone



Campus-Wide Wifi



IT Security



Electronic Health Record



Wearable Technology



Telehealth Technology



Smart Home Technology



Advanced Audio and Video Capabilities



Automation Technology



Questions

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