

Not-for-Profit Provider Checklist: Pro-Active Organization Characteristics

Below are characteristics Ziegler has observed among strong, pro-active organizations. Compare these characteristics to your organization:

Vision – My organization and its leaders are:

- Innovative and trend-setting; thought leaders
- Unafraid to fail in new ventures
- Regularly collecting information and insights from other industries/walks of life
- Uncomfortable with the status quo
- Embracing partners for mutual gain
- Embracing the organization's Mission in thought and decision-making

- Board operates at a generative level – ensuring the success of the Board and the organization in the future

Resident Experience – my organization:

- Embraces person-centered care
- Provides modern and current common and living areas
- Commits to continual reinvestment in physical plant
- Adopts technology where beneficial to resident experience
- Promotes a culture of wellness and healthy living
- Fosters disclosure and transparency to residents
- Provides easily accessible and understandable services
- Seeks resident feedback and evaluates the organization's own performance

Team Members – my organization believes in/practices:

- Innovation and learning
- Quality communication patterns and practices
- Active succession planning from board to mid-level management team
- Inclusive environment where ideas are valued
- Team approach
- Robust staff training and professional development
- Involved staff who understand the organization's direction
- Competitive (and creative) compensation & benefits packages
- Embracing generational, racial, ethnic and other differences among staff

Changing Healthcare Marketplace – my organization is:

- Making or has made significant investment in IT, including outcomes tracking
- Making strategic updates to offerings/physical plant in healthcare
- Organizational name is branded within target markets
- Leveraging strategic post-acute partners; entering into partnerships along the continuum
- Has the ability to embrace change, which may include closing skilled nursing, converting to high-acuity assisted living, partnering with others to re-invent the high-acuity care options on campus

Growth – my organization is:

- Deploying existing real estate assets for their highest and best use
- Engaging in expansion/repositioning of older assets and resident offerings
- Open to growth through affiliations and partnerships
- Deeply understands needs and preferences of target markets
- Considering expansion into diverse but related services and business lines

Financial Health – my organization is:

- Achieving financial ratios equal to or above industry benchmarks
- Experiencing strong occupancy across all levels of living
- Creating a strategic growth fund for future endeavors (setting aside excess earnings in some fashion for future growth)
- Recruiting sophisticated board members who understand the organization's financials and bring expertise in finance, investments, and the like
- Offering financial transparency to residents
- Able to repay its debt
- In compliance with debt covenants
- Aware of the financial health of discrete business lines and able to “prune the vine” if necessary to save the overall organization