To Be or Not To Be

...that is the question in regards to YOUR Community.
To Be or Not To Be

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Creating a sustainable community over time requires a purpose driven planning process which thoughtfully considers new construction versus retrofitting for repositioning existing properties / environments / culture.
Objectives

- Become aware of **real-life examples** of developing planning strategies as opportunities to learn for your community.
- Realize a community's unique **culture matters** and "why" what you do drives everything in order to create your unique sense of place.
- Understand the value of **programming and planning** to specifically reflect **your community's context**
Program & Planning Process

- Understanding & Defining the Problem before we can begin to solve it
- Defining your Specific Context
- Defining / Identification of Stake Holder
- Identification & Prioritization of Specific Goals, Facts, Needs & Issues
Program & Planning Process
Executive Staff Input
Program & Planning Process
Summary & Prioritization
Program & Planning Process

- Arranging program components within the context of the site for optimum performance & value.
- Deliberate alternative futures
- Analyze and Evaluate
- Test & select Alternatives / options with defined priorities
Why?

- To ensure peace of mind and high value to those we serve
  - Sun Health Senior Living

- Inspiring Passion. Connecting People.
  - Royal Oaks
Grandview Terrace
1997-The Beginning

- Opened in June 1997
- Life Care Community under Arizona Department of Insurance Regulations
- Country Club Appeal
- 98% Occupancy until 2009
Royal Oaks
1983-The Beginning

- Opened in December 1983
Royal Oaks
1983-The Beginning

- Strong emphasis on Health Care
- 1 “formal” dining room
- Small fitness center, small outdoor pool
- Limited social & gathering spaces
- Still full occupancy & building strong wait list
Royal Oaks
1983 - The Beginning

- Lifecare Type A Contract
- 32 acres of land
- 249 IL Apartments
- 110 IL Garden Homes
- 94 Skilled Nursing Beds (semi-private rooms)
- Medicare Certified
- Full Occupancy
Royal Oaks Campus Plan - Aging

+30 years. Old. Much CapX. Replace?
10-29. Aging. Increasing CapX
Grandview Terrace

Now What?

2015. 88% Occupancy.

- New Customer Profile
  - Different view of dining
    - Very casual
    - More health conscious
    - Less structured more freedom to choose
    - Varied dining hours
Grandview Terrace

2015. 88% Occupancy.

- Competition
  - Sun City West residents moving across Grand Avenue
  - The shiny new penny
    - The Colonnade
Grandview Terrace

Now What?

2015. 88% Occupancy.

- New Customer Profile
  - Jane Fonda and Jazzercise
    - State of the art equipment
    - Personal Trainers
    - Massage and Acupuncture
    - Salon and Spa – Manicures/Pedicures
    - Not younger in years BUT
Grandview Terrace

Now What?

Campus Context.

- Refurbish or Redevelop or?
  - Planning Process
  - Financial Implications of each option
  - Cost of doing nothing
- Landlocked
  - Parking challenge
  - Not very resort-like
- One cohesive campus
- Future phasing
Royal Oaks

Now What?

- Strategic Planning
- Market Consideration
- Operational Consideration
- Financial Considerations
Grandview Terrace

Decision Time

- Big Picture
- Will the solution address the short, medium & long term issues
- Is it financial feasible?
Grandview Terrace Master Planning

Existing Campus
Grandview Terrace  Master Planning

Masterplan Option 1

1. New Fitness
2. New Entry
3. New Dining
4. Contiguous Campus
Grandview Terrace  Master Planning

Masterplan Option 2

1. New Fitness
2. New Entry
3. Renovated Dining
4. Contiguous Campus
Masterplan Option 3

1. New Entry
2. Renovated Fitness
3. Renovated Dining
Grandview Terrace Master Planning

Masterplan Option 4

1. Renovated Entry
2. Renovated Fitness
3. Renovated Dining
Grandview Terrace Master Planning

Prioritization of Site Development
Royal Oaks
Decision Time

- Took action on a number of our strategic priorities
- Identify areas that could be remodeled & updated
- Aggressively start on a process to update apartments & garden homes
- Combine smaller side by side apartments into large floor plans
- Pursue buying some adjacent land
- 4 acres purchased plus a neighboring business
- Relicensed Skilled Nursing to Directed Care AL
- Converted to private rooms
Royal Oaks
Decision Time – Today’s Property

48 Acres
New vs Renovation

Consider Existing Facilities:
1. Good “Bones”
2. Program Priorities Achievable
3. Code Compliant
Health/Wellness at Royal Oaks

Before
Health/Wellness at Royal Oaks
Dining at Royal Oaks

Before
Dining at Royal Oaks

After
Finding Lost Space at Royal Oaks
Finding Lost Space at Royal Oaks

After
Memory Care in Health Center – Corridor/Living Space

Before
Friendship House at Royal Oaks – Corridor/Living Space

After
Memory Care in Health Center – Courtyard Access

Before
Friendship House at Royal Oaks – Courtyard Access

After
Memory Care in Health Center – Dining

Before
Friendship House at Royal Oaks - Dining

After
Memory Care in Health Center - Entry

Before
Friendship House at Royal Oaks - Entry

After
La Loma Village at Litchfield Park
Grandview Terrace at Sun City West

Before
Grandview Terrace at Sun City West
Grandview Terrace Independent Living

After
Grandview Terrace Memory Support - Bistro
Grandview Terrace  Memory Support

After
Grandview Terrace Memory Support

After
SUMMARY

- No silver bullet
- Process is specific to each Community / Culture
- Process continues & evolves with time as priorities are developed & changed with each project / phase
- Communities need to differentiate themselves recognizing and promoting their own strengths
- Visit your competition
SUMMARY

- You may end up with a different solution than originally planned, but needs to align with your specific culture / context
- Be open to market changing relative to Health Services
- Continually monitor and review your pricing structure relative to your revenue sources
- Don’t play it safe – what is standard today will be obsolete tomorrow
Don’t Play it Safe