

Sample Transition Communications Plan

Goal: To support a smooth transition between National Church Residences CEOs while maintaining confidence in the organization's leadership among internal and external audiences.

Objectives:

- Display the confidence of the board and current CEO in the incoming CEO and the rest of the executive team.
- Ensure that relationships primarily held by the current CEO are transferred effectively.
- Show stakeholders that the organization has a strategic vision that will endure through the transition.
- Express appreciation to outgoing CEO.
- Capture the outgoing CEO's history in a manner that can be passed through to future employees.
- Prepare and execute a 100-day plan for the incoming CEO.

Tone:

- Optimism
- Enthusiasm/confidence
- Productivity
- Celebration

Measurement: A survey completed by senior leadership six months into the new CEO's tenure.

Timeline

Date	Activity
Dec. 13, 2013	Board selects CEO-elect. Post meeting: CEO & Board Chair meet with CEO-Elect, and then senior leaders.
Dec. 14, 2013	News release and announcement ready in case of leaks.
Dec. 16, 2013	Annual senior leadership retreat: Transition plan discussed.
Dec. 17, 2013	New Era video with Board Chair, CEO and CEO-elect filmed. Key partner list finalized.
Jan. 2, 2014	Memo to employees with New Era video sent via email. CEO & CEO-elect make personal calls to key partners.
Jan. 6, 2014	Letter to key partners sent.
Mid-January 2014	Aligned elevator speeches prepared for CEO & CEO-elect in 2 minute, 10 minute and longer version.
End January 2014	Section on CEO-elect's activities added to Monthly Board Update.
February 2014	Employee newsletter issued.
February 2014	Meetings to begin relationship transfers begin.

July 2014	Professional photography of CEO and CEO-elect together. CEO-elect narrates a video on what the organization does with two openings shot identifying him as CEO-elect and as president and CEO.
Sept. 20, 2014	CEO's retirement dinner to raise money for Slemmer Fund for thought leadership and education.
Sept. 21-24, 2014	A Force for Good National Conference held in Columbus with 900 employees in attendance. CEO opens with speech. Incoming CEO concludes conference with his speech, introducing themes for his presidency. News release issued.
Late September 2014	Begin active outreach to schedule interviews with local and trade reporters.
October 2014	"How I'd Like to Be Remembered" column by CEO in bimonthly employee newsletter
November 2014	CEO is interviewed for one hour of archival footage about his experience at the organization.
Nov. 19, 2014	Joint speech at Columbus Metropolitan Club.
Dec. 12, 2014	Board member: Professional photography of executive team with incoming CEO. Board members with outgoing CEO.
Dec. 12, 2014	Retirement party for outgoing CEO with board, employees and partners.
Dec. 16, 2014	Annual senior leadership retreat at CEO's home.
December 2014	"Thank You" column from CEO in bimonthly employee newsletter
Dec. 29, 2014	CEO sends out last board update.
Dec. 30, 2014	CEO sends out "thank you" email to all staff

First 100 Days Communications Plan

- Assert your own agenda.
- Put communications to employees first.
- Tend to the board.
- Make an explicit statement of your values.

Messaging Themes

- Mission Forward: Quality, Reliability, Safety, Satisfaction.
- Shared Leadership

Jan. 5, 2015	First all-staff email with link to podcast. News release issued. Welcome message changed from Tom to Mark on digital boards.
Jan. 12, 2015	Homefront "The Torch Is Passed" issue is distributed to 9K mailing list.
Feb. 2, 2015	First employee newsletter column
Feb. 11, 2015	Speech at Glen Campbell documentary showing.
Feb. 16, 2015	Redesigned board update from Mark goes out prior to his first board meeting.
April 7, 2015	Speech at Upper Arlington Rotary Club Roundtable.
April 13, 2015	Speech at Columbus Rotary Club.
April 17, 2015	All staff town hall meeting, recorded for those off site.



STRATEGIC PLAN 2015-2020

OPERATIONAL 5-YEAR STRATEGIES

AFFORDABLE HOUSING OPERATIONS

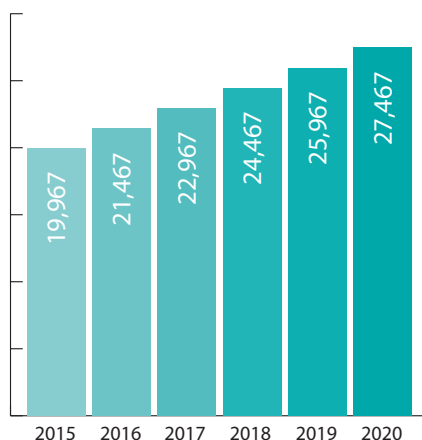
MEASURES OF SUCCESS INCLUDE:

- ◆ Excellent scores on HUD surveys and reviews.
- ◆ High levels of employee retention.
- ◆ Excellence in financial performance.
- ◆ Superior occupancy levels.
- ◆ Exceptional resident satisfaction



AFFORDABLE HOUSING EXPANSION

GROWTH IN UNITS OF AFFORDABLE HOUSING



RESIDENTIAL HEALTH CARE OPERATIONS AND GROWTH

MEASURES OF SUCCESS INCLUDE:

- ◆ Quality services measured by third-party rating agencies and customer surveys.
- ◆ High levels of occupancy.
- ◆ Excellent financial performance.
- ◆ Partnering with health plans and other health care providers.



MISSION THE NATIONAL CHURCH RESIDENCES WAY

The mission of National Church Residences is to provide quality housing and care at affordable prices in communities of caring persons. Our mission is national in scope and originates from a Christian commitment of service to older adults, which began in 1961. We have become a leading name in senior services, retirement community management and support for people in need.

2335 North Bank Drive
Columbus, Ohio 43220

614.451.2151 Local
800.388.2151 Toll free

NationalChurchResidences.org

HOME & COMMUNITY SERVICES

MEASURES OF SUCCESS INCLUDE:

- ◆ Establish Service Coordination at every National Church Residences housing location.
- ◆ Outstanding quality in service delivery.
- ◆ Excellent financial performance.
- ◆ Expansion of services.

HEALTH CARE EXPANSION

MEASURES OF SUCCESS INCLUDE:

- ◆ Open Upper Arlington Center for Senior Health.
- ◆ Grow Affordable Assisted Living assertively.
- ◆ Increase assertively the volume of outpatient therapy.
- ◆ Develop and expand models of housing as a platform for services.

HEALTH CARE HOUSING INTEGRATION

MEASURES OF SUCCESS INCLUDE:

- ◆ Assertively grow our penetration of the medical home and home care model into every service location.
- ◆ Enhanced service coordination in every location.
- ◆ Develop partnerships with health plans around value-based reimbursement.
- ◆ Establish preferred provider relationships with physician groups and hospitals.

SUPPORTIVE HOUSING OPERATIONS AND EXPANSION

MEASURES OF SUCCESS INCLUDE:

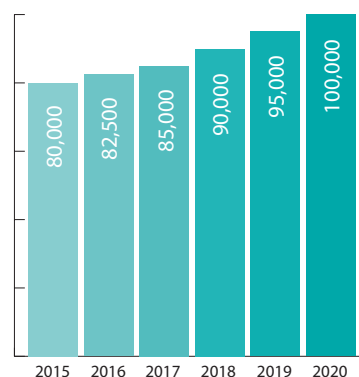
- ◆ Expand supportive housing assertively with at least two projects per year.
- ◆ Ensure supportive housing has a robust financial platform.
- ◆ Maintain strong workforce development programs.
- ◆ Develop and maintain Good Neighbor Agreements with all communities.

PHILANTHROPY AND COMMUNICATION

FUNDRAISING GOALS



GROWTH IN VOLUNTEER HOURS



PUBLIC POLICY

MEASURES OF SUCCESS INCLUDE:

- ◆ Clear, positive results on National Church Residence public policy initiatives.
- ◆ Deploy a grassroots initiative on behalf of one critical legislative initiative.
- ◆ Actively partner with HUD on a redesigned senior housing program with enhanced services.
- ◆ Protect and improve Ohio's adult day care reimbursement rate in the 2016-17 biennial budget.