



Armed Forces Retirement Home Strategic Plan 2020-2022

SEPTEMBER 2019

Agency Overview

Mission

To fulfill our Nation's commitment to its veterans by providing premier retirement communities with exceptional care and extensive services.

Vision

Retirement communities committed to excellence, fostering independence, vitality and wellness for veterans, making vibrant places in which to live, work and thrive.

Snapshot

The Armed Forces Retirement Home (AFRH) is an independent establishment in the Executive Branch of the Federal Government, the purpose of which is to provide residences and related services for certain former members of the Armed Forces. While today's organization was formed by Congress in 1991 as the only continuing care retirement community (CCRC) operated by the Federal Government, AFRH's mission began in the 19th century. The Armed Forces Retirement Home Act of 1991 merged two storied institutions under one corporate organization: the U.S. Soldier's and Airmen's Home in Washington, D.C. established in 1851, and the U.S. Naval Home in Gulfport, Mississippi, originally established in Philadelphia, Pennsylvania in 1834.

Currently AFRH can accommodate more than 1,100 veterans at its two locations. Veterans eligible to become residents include those who spent the majority of their military service in enlisted, warrant officer, or limited duty officer ranks. Other eligibility requirements include a combination of active duty time, service-related disability, combat zone, women's component, and honorable service, as specified in law¹. AFRH continues to evaluate eligibility requirements to better support the "Total Force," and we are working to expand eligibility to retired members of the National Guard and Reserves. The Home is also looking for flexibility, based on availability, to house transitioning wounded warriors and Gold Star families.

Veterans enter AFRH in independent living with access to four higher levels of care as their wellness needs require: independent living plus, assisted living, long term care, and memory support. Residents are admitted regardless of their assets or income. Each resident pays a monthly fee determined annually based on a maximum amount or a percentage of their gross income, whichever is less. Most residents pay significantly less than it costs AFRH to deliver all-inclusive services: a private room and bath, meals, on-site wellness clinic with primary medical and dental care as well as certain specialty providers, a wealth of physical and social activities, local transportation, and many other amenities. Residents of the Washington campus enjoy hilltop views of the capital city on 272 acres of rolling landscape while Gulfport residents enjoy a waterfront location with direct beach access on the Mississippi Sound.

¹ Title 24, United States Code, section 413

Funding

AFRH is financed by a trust fund in the U.S. Treasury. Congress approves an annual expense budget through the appropriations process, though unspent funds do not expire but remain in the trust fund for later use. Dedicated income sources include resident fees, a monthly payroll deduction as well as disciplinary fines and forfeitures from active duty enlisted ranks, interest on trust fund balances, and rental income from real property leases which will be an increasingly significant source of revenue. To expand revenue sources, in 2018 Congress granted AFRH the ability to actively solicit gifts and donations.

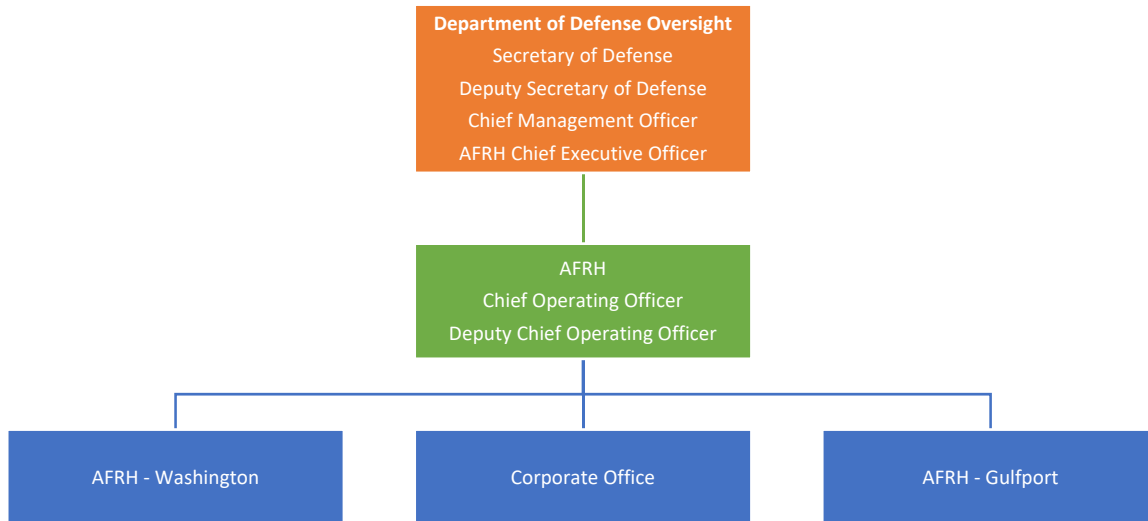
In recent years, and on numerous occasions throughout the Home's history, the income from these sources has not been sufficient to cover annual expenditures, forcing withdrawals from trust fund balances and appropriated support from the General Fund of the Treasury in fiscal years since 2016. This occurred due to AFRH's largest revenue stream, fines and forfeitures, declining 46 percent between fiscal years 2009 and 2016; active duty withholding declining 7 percent with the reduction in active duty forces; investment income declining over 90 percent; and facility construction. The trust fund balance has been depleted to the point where it is unable to support AFRH operations and must be restored through a series of reforms over multiple years to create a sustainable path for the future of the Home and the mission it serves. Under new leadership, the AFRH is aggressively working to expand its revenue sources to reverse this trend and permanently eliminate the need for special appropriations.

Organization

AFRH's organizational structure and oversight is unique in the Federal Government. While it is an independent agency, AFRH's leadership and administration is overseen by the Secretary of Defense. The Deputy Director of the Defense Health Agency advises the Home on medical, mental health, and dental care. In addition, all services to residents are accredited by nationally recognized civilian accrediting organizations including The Joint Commission (TJC) and the Commission for Accreditation of Rehabilitation Facilities (CARF). Our financial, systems, and acquisition activities are subject to independent annual audit, as well as Government Accountability Office and Office of Management and Budget compliance requirements.

The Secretary of Defense's oversight responsibilities are delegated to the Office of the Chief Management Officer and exercised day to day by the AFRH Chief Executive Officer (CEO), a Department of Defense executive. The CEO appoints key AFRH officials including the Chief Operating Officer (COO) who serves as the AFRH agency head, as well as the administrators and ombudsmen for each of the two campuses.

The agency headquarters is located in Washington and consists of a small corporate staff to manage common agency functions and services. Each of the two campuses has an identical department structure and similar staff profile.



Vision 2035

As it actively works to restore the trust fund’s solvency and sustainability, AFRH also recognizes that leveraging and managing its natural and built assets to best advance its mission is equally vital. Deferred maintenance, historic preservation, and the high costs and long lead times associated with building, operating, and maintaining real property and equipment all pose significant risk to AFRH’s future. A long view is necessary, so AFRH is setting its sights on 2035 to plan for and methodically address our aging and outdated infrastructure and to accommodate shifting industry trends and generational life preferences. To that end, we believe the following elements should form the core of AFRH 15 years from now:

Multigenerational communities of veterans

Since its roots in the 19th century, AFRH has served veterans too injured or ill to live on their own, and we pride ourselves on providing best-in-class care to our residents for the rest of their lives. A central piece of AFRH’s mission in the past was to provide support for veterans leaving the military or encountering difficulty thriving in civilian life. We believe the AFRH campuses of 2035 must be generationally diverse villages with a range of services and living environments attractive to all ages of veterans.

Dynamic living environments

Many potential residents are deterred by the institutional look and feel of our facilities. This is by no means unique to AFRH, as private sector communities across the country have moved toward decentralized individual living like apartments and detached homes but with the amenities of a campus setting. AFRH’s campuses offer a wealth of opportunity and space to experiment with state-of-the-industry concepts and amenities, and we should leverage those

opportunities to develop competitive offerings particularly in:

- Diversity of residence types and styles
- Choices for dining and self-catering
- Whole-person amenities, activities, and services

Local and geographic expansion

Both of our current campuses offer space for expansion to include new buildings or additions to expand our capacity to serve more enlisted veterans. We are limited by the historic status of our Washington campus and the smaller size of our Gulfport campus, but our greatest limitation is geographic. Veterans, like most people, prefer to live near family and friends and are more likely to choose communities close to places they know and people they love. According to the Department of Veterans Affairs, the top five states for veteran population are the same as those for total population: California, Texas, Florida, New York, and Pennsylvania. There are four states with veteran populations of 9 percent: Alaska, Maine, Montana, and Virginia; and 13 states with veteran populations of 8 percent. Our goal from now until 2035 is to evaluate our existing geographic footprint and determine the best opportunities for enhancement and expansion.

Of primary focus for this long view is the 272-acre Washington, DC campus. While our 80-acre mixed use redevelopment effort, in planning for more than a decade, will by 2035 gradually offer exciting new amenities, services, and open spaces to AFRH and DC residents alike, the remaining 192 acres must continue to serve our mission, add value to our product, and attract future residents. The Washington campus has many challenges, however, the most significant for its long-term viability is the primary independent living residential facility. AFRH will implement asset management practices to align mission, leadership, organization, data, decisions, evaluation, and monitoring, all with the objective of maximizing asset value. Using leading asset management practices and standards-based data, AFRH will plan for the replacement of the independent living facility through creative land use, restoration of an historic building for apartments, and new development.

Strategic Goals 2020-2022

This is a short-term three-year plan focused on decisive actions to continue AFRH on course for a solid and sustainable future. It is not an agency strategic plan as defined by 5 USC 306 or OMB Circular A-11, which would encompass a four-year administration and include government-wide goals following prescribed formats and requirements.

Strategic goals are a framework for thinking about problems, setting priorities, and making decisions. They help answer the question: where are we going? Objectives map how we get there. These goals and objectives are agency-wide objectives for the next three years. Corporate and campus divisions will craft business plans that further define and add to these priorities within the context of their individual missions. A strategic plan should not be a self-fulfilling prophecy, but rather a living framework that adapts to evolving circumstances. To that end, AFRH leadership will revisit the plan each year to take stock and revise goals and objectives as appropriate.

Strategic Goal 1 – Quality Care First and Always

Quality Care First and Always affirms that AFRH's core mission is to care for veterans in need. It is our legacy, our reason for being, and the lens for looking to and charting our future. It is the foundation to continue to build and refine answers to fundamental questions about who we serve and what we offer.

Strategic Questions

- Are we reaching veterans who need our services?
- What needs are we filling?

Goal 1 Objectives 2020-2022

➤ Achieve an occupancy rate of 90 percent or better

Empty rooms are a waste: missed opportunity to serve a veteran in need, lost revenue, and a sunk cost to maintain facilities sitting unused. If AFRH is providing a valuable in-demand service then all rooms should be full. If they are not, eligibility criteria are too limited, the quality of our facilities and programs need improvement, or veterans who may need services are not being reached. AFRH is a unique organization with a focused mission, but many of our services are comparable to private sector offerings. Therefore, in pursuing this objective we must be attuned to competitive market dynamics.

Initiatives

○ *Expand eligibility criteria to serve additional veterans*

Currently 86 percent of AFRH residents are military retirees aged 60+ with over 20 years of active duty service. The average age of residents is 83 years and 89 percent are male. Veterans eligible because of injury, disease, or disability are underrepresented because governing law had limited eligibility to economic factors. In late 2018, Congress changed the law at AFRH's request to eliminate economic factors as a sole determinant for admission. Further, Congress enacted changes that create a pathway to admission for veterans with mental health or substance abuse issues who were previously denied categorically. In 2019 we requested legislative changes to broaden eligibility to retired members of the National Guard and Reserves and to eliminate the minimum age requirement for Category 1 applicants. At the time of this publication, Congress had not completed action on the National Defense Authorization Act (NDAA) for Fiscal Year 2020. If the proposal is unsuccessful in the fiscal year 2020 NDAA, AFRH will make the request again during the fiscal year 2021 legislative cycle.

○ *Admit spouses when space is available*

The AFRH mission has been and will continue to be serving enlisted veterans when they need our care. Most veterans enter AFRH at an advanced age after a spouse has passed away. We believe it will enhance our community if we can admit spouses together with their eligible veteran when space is available. In 2018 we requested and Congress adopted a legislative change which allows spouses to be admitted with their eligible veteran. AFRH developed an initial fee structure and policies which it has been market testing and revising under a pilot program. In addition to determining appropriate fees and admissions processes, AFRH has also been developing prototype room conversions on its Washington campus to accommodate couples. Room conversions will occur gradually between 2020 and 2022. In 2020, we plan to request that Gold Star widows also be eligible when space permits.

- *Modernize residential facilities*
Washington campus Sheridan Building residences date from the 1960s with modest facelifts since then. Rooms are small and lack kitchenettes, and common spaces need refreshment. While structural layouts cannot be improved without substantial cost and renovation, we will make improvements in fittings and furnishings and combine rooms to make residential spaces more attractive and spacious. As part of the modernization, AFRH is assessing the feasibility and costs of expanding new wellness-focused amenities to enhance the attractiveness of living at the Washington campus. We estimate these modernization improvements will cost \$14 million.

➤ **Reorganize healthcare services for optimum income potential**

One-third of AFRH expenses, approximately \$21 million per year, fund healthcare services for our residents. Although all residents are eligible for health benefit programs including TRICARE, VA, Medicare, and Medicaid, as a Federal agency AFRH cannot currently obtain payment from these programs. AFRH will continue to request legislative changes necessary to receive program payments and will consider streamlining services to ensure a sustainable financial model, especially in light of increasing medical costs.

Initiatives

- *Ensure staffing is right-sized and professionally diverse*
Aligning with health benefit programs means following stringent requirements on provider types and qualifications, patient-to-provider ratios, and many other factors so that services are allowable. We will modify our staffing mix, policies, and systems to comply with these requirements. We should also better utilize medical professionals such as physician assistants and nurse practitioners which would serve many resident healthcare needs at lower cost.
- *Develop plans for care gaps in skilled nursing*
AFRH does not currently have a skilled nursing facility or capacity to handle sub-acute care, representing a significant gap in our services which forces residents to leave our facilities when they need this care. Resources and requirements to offer these services will be determined and a path decided in 2020.

Strategic Goal 2 – Stewardship at Our Core

Stewardship at Our Core reminds us that we are caretakers responsible for decisions now that will determine how AFRH will exist for veterans in the future. We are guardians for veterans who have come to AFRH as residents, made it their home, and whose health and welfare depends on us. We are trustees for active duty servicemembers whose pay supports veterans in need today with the expectation AFRH will be here for them if they need us later. We are custodians of a true National treasure, continuing an illustrious history while preserving AFRH’s legacy. We are stewards for taxpayers who come to our aid when we need it, with the promise their resources will be responsibly used because our mission is so vital.

Strategic Questions

- Are we making the best use of limited resources?
- Who and what are we investing in, and when?

Goal 2 Objectives 2020-2022

➤ Manage assets productively

Underutilized real property incurs ongoing maintenance expenses without offsetting revenue. With 272 acres of prime real estate in the Nation's capital, the Washington campus is an extraordinary asset which will be the keystone in building AFRH's long-term fiscal solvency.

Initiatives

○ *Develop a strategic asset management plan*

A strategic asset management plan initiated in fiscal year 2020 will be a planning tool to clarify intentions, priorities, and practices to be adopted. It will take a long-term view, considering our Vision 2035 outlined earlier, and consider the combination of organization needs, stakeholder expectations, and the realities of existing assets and asset management capabilities. It will guide and constrain AFRH's decisions pertaining to natural and built assets. By 2022 AFRH will implement asset management practices consistent with the International Organization for Standardization ISO 55000 series to align mission, leadership, organization, data, decisions, evaluation, and monitoring, all with the objective of maximizing asset value. Using ISO 55000 practices and standards-based data, the AFRH will plan for the replacement of the independent living facility through creative land use, restoration of an historic building for apartments, and new development.

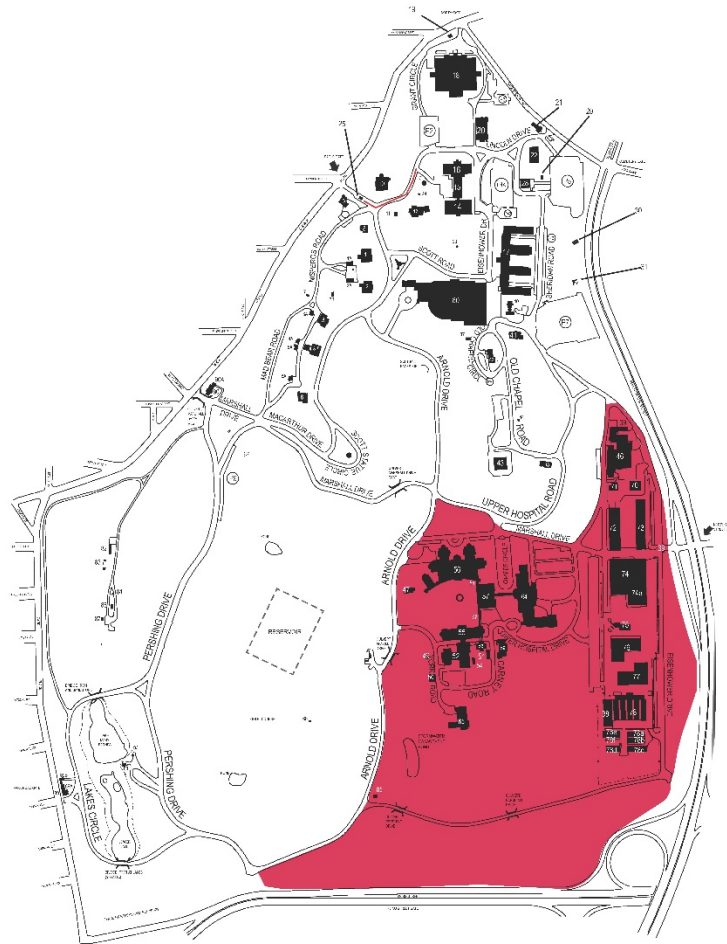
○ *Execute a ground lease on the AFRH-Washington development zone*

In the making for over a decade, the now 80-acre Washington campus development zone represents AFRH's greatest long-term opportunity to generate significant new ongoing revenue. Since the first attempt at development was aborted due to the 2008 economic downturn, the neighborhoods surrounding the campus have experienced continuous revitalization. In May 2018 AFRH, through General Services Administration, issued a request for proposals with submissions due late September 2018. AFRH placed new emphasis on upfront and early-stage income as well as integration with the entire campus and surrounding community. A lead developer was selected in August 2019, which is followed by a lease negotiation and entitlement period expected to conclude during fiscal year 2020.

DOD commissioned a business case study completed in November 2017 which recommended outsourcing golf course operations and estimated routine operating losses and occasional annual profits of \$100,000-150,000 on capital improvements of \$3-5 million. The golf course remains an important asset to the Home and we will work with the selected developer to revitalize the golf course as an amenity for our residents as well as the new development community and city writ-large.

Together these efforts form a comprehensive program to improve the quality of life for our residents and create a new neighborhood on our historic campus that will enhance the surrounding community and provide new amenities, jobs, and tax revenue in the District of Columbia.

Washington Campus Development Zone Summary



80-acre development zone in red

Approved Master Plan		
Use	Square Ft	Acreage
Residential	2,280,477	15.2
Office	1,191,391	7.4
Medical	290,650	1.4
Retail	214,086	1.8
Assisted Living	214,000	3.0
Hotel	126,391	7.5
Heating Plant Area	36,088	3.0
Open Space & Roads		40.5
Total	4,316,995	80.0

Timeline	
Industry Day	Mar 2018
RFP Release	May 2018
Proposal Submission	Oct 2018
Selection	Aug 2019
Lease Negotiation	FY 2020

- *Commission a feasibility study for the historic Grant Building and develop a plan for its restoration and use*

The Grant Building is a grand 169,000 square foot structure on the Washington campus completed in 1912 and closed in 1999. AFRH intends to retain the building for its core operations and will develop a plan for its preservation and renovation, which may include public-private partnership elements. With its historical grandeur, Grant provides an opportunity for event rentals and we are considering design options, costs, benefits, and fund sources to maximize use of the building. Retaining and restoring Grant will require significant investment for which we will need Congressional support in fiscal years 2022 and 2023.

- *Generate additional rent from underutilized buildings, quarters, and ancillary uses*

The Washington campus houses numerous buildings and houses currently either vacant or rented below market rates to employees. Most require only modest improvement to become revenue-generating and the variety of structures offers a diverse portfolio of potential tenants: Quarters One is an 8,000 square foot historic mansion at the heart of the campus' national historic site. Its grand rooms, porches, and lawns with sweeping views of the north campus are ideally suited to special event rentals from corporate and private parties. In late 2018 AFRH developed an arrangement with the President Lincoln's Cottage Foundation to revenue-share on events held in Quarters One as well as the south lawn of the Lincoln Cottage and our two chapel buildings. The Lincoln Cottage Foundation began marketing the new venues in spring 2019; we will continue to assess and refine the pilot program through 2019 and 2020 to establish this as another source of annual revenue.

There are eleven government houses of various sizes and qualities, some of which have been reserved for employees in key roles in resident support and management, which can otherwise be rented to employees, tenants, or offered to the public at prevailing market rates. In late 2018 AFRH made two houses available to private families at market rent. A third house is expected to become available to market in late 2019. The third floor of the AFRH headquarters section of the Sherman Building could be rented to tenants for office use. Finally, we have and will pursue ancillary revenue opportunities, particularly for parking and antenna installations. AFRH has executed parking rental agreements with the adjacent Department of Veterans Affairs and MedStar hospitals which will yield over \$800,000 annually until substantial development zone construction begins in those areas.

➤ *Transition to a cost-based resident fee model*

In April 2018 we announced a new resident fee structure that, among other changes, ties maximum fees to cost of care. This objective will complete the transition to a cost-based fee model for all residents by fiscal year 2023 and will ensure service costs are transparent to both residents and the staff. Taking care of residents regardless of their ability to pay for the services they received from us remains our key mission; therefore most residents will continue to pay fees based on percentage of income rather than cost-based maximum fees.

Initiatives

- *Implement service cost budgeting*
Revise budget formulation processes and timelines so operating budgets are set to costs per resident by level of care in advance of the fiscal year including required notification periods.
- *Reform hardship assistance and gross income calculations*
AFRH is committed to ensuring no resident is forced to leave AFRH due to unaffordability. We will revise policies and procedures regarding hardship assistance to extend fee relief and services to residents with financial difficulties. We will also review components of and deductions from gross income calculations.
- *Expand cost transparency*
We will revise systems, annual fee determination documents, and public reports and presentations to make the cost of services, income calculation, and subsidy amounts transparent to residents and other stakeholders.

➤ *Improve budgeting and financial management*

Operating budgets were produced and managed at the corporate level with minimal input by local managers and staff. Financial management was not routinely included as a factor in employee performance evaluations.

Initiatives

- *Implement operational-level budget formulation and execution processes*
We will continue to reform budget formulation processes so local managers have input and ownership and accountability of their department budgets from the outset of each budget cycle. Department managers will defend additional resource requests and campus administrators will manage cash flow decisions with corporate assistance and tracking.
- *Include financial management as a factor in employee performance evaluations*
We are working to revise performance plans and position descriptions to include financial management, accountability and compliance as key factors in performance evaluations and job requirements.

➤ *Streamline administrative activities*

AFRH invests significant resources into administrative services to handle routine functions common to any business: financial accounting and audit, purchasing and contracting, legal services, information technology, and a suite of human resource services including timekeeping and payroll, hiring, benefits administration and employee assistance, and labor relations. We also invest resources because of the many unique burdens of being a Federal agency to comply with laws and regulations in all of these business areas as well as extensive reporting and oversight requirements by Congress, the Executive Branch, and DOD. Many of these are mandatory, so while we can seek relief from especially burdensome requirements, we must also reduce and streamline our self-imposed workload and ensure that we are minimizing these costs wherever possible and appropriate.

Initiatives

- *Evaluate interagency agreements for administrative services*
AFRH obtains administrative services support through interagency agreements with other Federal agencies functioning as shared service providers. We will continually evaluate these agreements seeking the most cost-effective arrangements, as well as enhancements to current business models to gain efficiencies and cost savings where possible and to ensure compliance and accountability. Improvements include payroll modeling, budget planning and execution, and procurement and acquisition.

- *Consolidate or eliminate recurring requirements*
AFRH is required to prepare myriad reports on a recurring basis to comply with statutory, Executive Branch, and Congressional requirements. AFRH has already consolidated most forward-looking reports into our annual budget justification and most backward-looking reports into our annual performance and accountability report. We will request relief from burdensome and outdated reports through appropriate channels, to include requesting Congressional relief from triennial inspections by the DOD Inspector General which substantially duplicate other inspection and reporting requirements.

- *Improve policymaking processes*
Directives, policies, and standard operating procedures formalize how we conduct day-to-day business but they are not set in stone. Being agile requires flexibility to adapt to changing circumstances and priorities, and formal policies often trail how we are actually operating or unnecessarily restrict our decision-making. In 2020-2022 we will continue to establish procedures to ensure important policies are current, that policies are flexible to adapt to varying circumstances, and outdated or burdensome policies are streamlined or eliminated.

Strategic Goal 3 – Constantly Evolving

Constantly Evolving is a challenge to honor and build on our traditions while always adapting to the changing world around us. We are always competing—for resources, talent, attention, and trust—and must be willing and ready to experiment and change. We can be fearless to take risks when appropriate to our mission. That means knowing where we fit and how we deliver service and value by always engaging with and opening ourselves to partners and critics alike.

Strategic Questions

- Are we delivering value?
- What are the trends and how are our peers responding?
- Is what we are doing sustainable?

Goal 3 Objectives 2020-2022

- *Continue to reform leadership and succession planning*
AFRH has experienced continuous leadership changes in recent years. In February 2017, the Deputy Secretary of Defense shifted oversight responsibility for AFRH from the Under Secretary for Personnel and Readiness to the Chief Management Officer (CMO). The CMO concluded a new leadership structure was necessary to deliver progress and in November 2017 created a new AFRH

Chief Executive Officer position to exercise DOD's control and administration of AFRH full-time. The Chief Operating Officer continues to be the head of the independent agency as designated in law and reports to the CEO. To improve succession planning, the CEO and COO restored the Deputy COO position as AFRH's senior career official in April 2018. AFRH will continue to evaluate and revise its management structure to operate more effectively and drive improvement across the organization.

Initiatives

- *Transition procurement oversight and other functions to the Deputy COO*

In late 2017 the DOD Inspector General issued a report as part of its triennial inspection of AFRH operations which included a recommendation to separate procurement and financial functions and to reform contracting processes. In 2020 the Deputy COO will assume full responsibility as the agency's chief contracting official, as well as drive efficiency initiatives and management oversight in other operational areas.

- *Establish new leadership positions to promote reform*

In 2018 AFRH established a new Director of Administration and Finance position through DOD and assigned to AFRH, reporting to the CEO and COO. This position oversees financial management operations and manages initiatives to reform budget processes and resident fees as well as administrative services agreements and support transition.

Also in 2018, AFRH added a Director of Real Property Development through DOD and assigned to AFRH, reporting to the CEO and COO. This position will plan and navigate the complexities of the lease negotiation, entitlement and master plan amendment, and construction and permitting processes, as well as promote industry leading asset management practices to AFRH's substantial real property portfolio.

- *Improve staff recruitment, engagement, and retention*

The vast majority of our Federal employees and contract staff provide direct support to residents. They are essential to our operations and have the most direct influence on resident experience. Recruitment, training, management, and retention are arguably our most important investments since we could not continue to exist without a competent and well-functioning professional staff. We face strong and relentless competition to attract and keep the best people.

Initiatives

- *Communicate and coordinate*

The leading staff critique at AFRH, like most organizations, is the need for better communication at all levels. We will never be perfect communicators but we can always strive for improvement. AFRH will continue to look for ways to foster collaborative communication and coordination across functional areas to build trust and improve our service to residents.

- *Leadership and professional development*

Our present and our future depends on professionals who keep their skills current and lead by example at all levels of the organization. By our nature we attract passionate, dedicated people and passion often leads to interpersonal conflict. AFRH will always search for tools to enhance our ability to improve professional, personal, and interpersonal skills and dynamics.

➤ **Establish gifts and estates as a major source of support**

In late 2018 Congress approved an AFRH request to authorize solicitation of gifts. Private giving, corporate sponsorship, and estate planning are important revenue sources for non-profit retirement communities and veteran service organizations. Private support can increase and enhance the resources AFRH can commit to its programs and infrastructure, while also promoting AFRH's mission and visibility among key stakeholders. AFRH has initiated development of plans, structures, policies, and procedures to expand gifts, estates and other donations income as a major source of long-term financial support. In mid-2019 we contracted fundraising expertise to design and implement a fundraising program with a focus on identifying strategic connections with corporate and high net worth individuals.

Initiatives

- *Refine gifts and estates structures, policies, and procedures*
AFRH is in the process of building structures including accounting formats; policies; procedures; assignments; and annual plans, goals and objectives to assign and delegate appropriate responsibilities as well as ensure ethical management, with oversight mechanisms and financial, programmatic and administrative controls.
- *Develop a fundraising capacity*
Since gifts and estates are currently a minor source of revenue, AFRH is working to develop a fundraising capacity which may include new positions, contracts, partnerships, and resource allocation to develop and execute a fundraising plan.
- *Build fundraising partnerships*
AFRH will need to foster and maintain partnerships with outside organizations, other agencies, and service providers to make fundraising a successful revenue program. AFRH is working closely with outside organizations founded principally to support AFRH, including the Friends of the Old Soldiers Home to augment resident activities and provide volunteer support on the Washington campus, and The Old Soldiers Home Foundation started by AFRH residents to raise funds for capital improvements and expansion. A successful fundraising program will include a proactive fundraising strategy focused on expanding and enhancing individual, corporate and foundation relationships based on market analysis and research.
- *Develop an estate program*
AFRH has basic informational materials for residents who are interested in leaving a bequest to AFRH. Estate planning is an important source of revenue and long-term financial planning for most private-sector non-profit retirement communities, and AFRH is working to appropriately resource this program while ensuring the highest standards of ethics and accountability.

Summary List

Strategic Goal	Objective	Initiative
1	Strategic Goal 1 – Quality Care First and Always	
1.1	Achieve an occupancy rate of 90 percent or better	
1.1.1	Expand eligibility criteria to serve additional veterans	
1.1.2	Admit spouses when space is available	
1.1.3	Modernize residential facilities	
1.2	Reorganize healthcare services for optimum income potential	
1.2.1	Ensure staffing is right-sized and professionally diverse	
1.2.2	Develop plans for care gaps in skilled nursing	
2	Strategic Goal 2 – Stewardship at Our Core	
2.1	Manage assets productively	
2.1.1	Develop a strategic asset management plan	
2.1.2	Execute a ground lease on the AFRH-Washington development zone	
2.1.3	Commission a feasibility study for the historic Grant Building and develop a plan for its restoration and use	
2.1.4	Generate additional rent from underutilized buildings, quarters, and ancillary uses	
2.2	Transition to a cost-based resident fee model	
2.2.1	Implement service cost budgeting	
2.2.2	Reform hardship assistance and gross income calculations	
2.2.3	Expand cost transparency	
2.3	Improve budgeting and financial management	
2.3.1	Implement operational-level budget formulation and execution processes	
2.3.2	Include financial management as a factor in employee performance evaluations	
2.4	Streamline administrative activities	
2.4.1	Evaluate interagency agreements for administrative services	
2.4.2	Consolidate or eliminate recurring requirements	
2.4.3	Improve policymaking processes	
3	Strategic Goal 3 – Constantly Evolving	
3.1	Continue to reform leadership and succession planning	
3.1.1	Transition procurement oversight and other functions to the Deputy COO	
3.1.2	Establish new leadership positions to promote reform	
3.2	Improve staff recruitment, engagement, and retention	
3.2.1	Communicate and coordinate	
3.2.2	Leadership and professional development	
3.3	Establish gifts and estates as a major source of support	
3.3.1	Refine gifts and estates structures, policies, and procedures	
3.3.2	Develop a fundraising capacity	
3.3.3	Build fundraising partnerships	
3.3.4	Develop an estate program	

Key Metrics

These are key metrics AFRH management will use to measure progress toward our strategic goals and objectives, including baseline measures and targets to reach by the end of this three-year plan in 2022.

Metric	Baseline	2022 Target	Change
Core Metrics			
Trust fund balance	\$49.7 million	>\$90.0 million	+\$40.3 million
Occupancy rate	76% (861/1133)	90% (1020/1133)	+14% (+159)
Revenue	\$45.9 million	\$80.0 million	+\$34.1 million
Spending authority	\$64.3 million	\$80.3 million	+\$16.0 million
Deferred maintenance	\$135.0 million	\$106.0 million	-\$29.0 million
Supporting Metrics			
Lease revenue	\$566,000	\$3.0 million	+\$2.4 million
Washington development zone revenue	\$0	\$8.0 million	+\$8.0 million
Resident fee revenue	\$16.7 million	\$22.8 million	+\$6.1 million
Military contributions revenue	\$6.7 million	\$21.3 million	+14.6 million
Donations, gifts, and estates	\$0.5 million	\$3.0 million	+\$2.5 million
Healthcare revenue and offsets	\$0	\$4.3 million	+\$4.3 million
Appropriations received	\$22.0 million	\$5.0 million	-\$17.0 million
Average of maximum fees to cost	41%	100%	+59%
Capital expenditure authority	\$1.0 million	\$10.0 million	+\$9.0 million
Category 2 & 3 eligible residents	10%	20%	+10%
Average age	83	78	-5

Metrics Overview

Trust fund balance

For the purposes of this plan, we define the trust fund balance on a net cash basis: the balance sheet value of intragovernmental assets minus total liabilities. The \$49.7 million baseline is derived from the Fiscal Year 2017 Performance and Accountability Report balance sheet. If we are successful in our initiatives to increase revenue and we expect to increase the balance of the trust fund to equal or greater than \$90.0 million in fiscal year 2022.

Occupancy rate

The baseline occupancy was taken from the population of residents present just prior to the fee structure changes announced in April 2018. If we are successful in our efforts to expand eligibility and marketing and improve the attractiveness of our facilities to potential residents, by 2022 our goal is to increase occupancy to 90 percent. We assume our 1133-resident capacity will remain constant through 2022.

Revenue

Baseline revenue is \$45.9 million received in fiscal year 2017 from the following sources: fines and forfeitures, resident fees, active duty withholding, investment interest, leases, gifts and donations. The 2022 goal of \$80.0 million is a rounded assumption of the revenue goals as described in the supporting metrics.

Spending authority

Spending authority is determined annually by the Congressional appropriations process. In fiscal year 2017 spending authority was \$64.3 million, including \$63.3 million for operation and maintenance and \$1.0 million for construction and renovation. Our goal by fiscal year 2022 is to increase the authorized amount by \$10.0 million to \$80.3 million to support operational expenses of a return to full occupancy and additional capital investment to improve our facilities and reduce our deferred maintenance backlog.

Deferred maintenance

A new metric in this edition of the strategic plan, the \$135 million deferred maintenance baseline was discussed as a future budgetary concern in AFRH's congressional budget justification for fiscal year 2020. This includes five high-priority projects totaling an estimated \$19.0 million which are critical to operations and safety for our high-risk residents such as electrical and water infrastructure, elevators, and chillers. Our goal by 2022 is to eliminate \$29.0 million of deferred maintenance items including these \$19.0 million of high priority projects plus \$10.0 million of additional significant projects.

Lease revenue

In fiscal year 2017 we earned \$566,000 from leases and sales. By the end of 2022 we aim to increase this revenue to \$3 million through initiatives, principally through our charter school, parking, and residential quarters leases.

Washington development zone revenue

The first opportunity for revenue from the Washington campus development zone ("Zone A") will come once a lease is negotiated and executed with the master developer. We anticipate a lump sum lease payment upon execution of the lease, followed by additional lump sum lease payments as parcels move through various stages of development, culminating in level ground lease payments for the remainder of the lease. While we will not have a complete picture of ground lease revenue until lease negotiation is complete, we estimate revenue from Zone A revenue to be \$8.0 million in 2022, contingent upon entitlement requirements and construction schedule.

Resident fee revenue

In fiscal year 2017 we earned \$16.7 million from resident fees. The 2022 target of \$22.8 million was derived using the population of residents present just prior to our fee structure announcement and is based on multiple assumptions consistent with our goal of achieving 90 percent occupancy.

Military contributions revenue

A new metric in this edition of the strategic plan, in fiscal year 2019 AFRH received \$6.7 million in contributions from active duty service members through pay withholdings totaling \$0.50 per month per member. Since Congress authorized it in 1994, the Secretary of Defense may approve increasing this amount to \$1.00. Assuming military end-strength remains flat, this would double the baseline amount to \$13.4 million. The AFRH CEO has engaged in significant outreach to senior enlisted leaders to gain support for this action. If Congress makes a statutory change to extend AFRH eligibility to retired members of the National Guard and Reserves with a corresponding extension of contributions from pay, we estimate a revenue increase to AFRH of \$4.1 million at the \$0.50 contribution level and \$8.2 million at the \$1.00 level. Taken together we estimate the potential revenue from these sources at \$21.3 million.

Donations, gifts, and estates

AFRH is now authorized to solicit donations. The baseline is the amount shown in the Fiscal Year 2017 Performance and Accountability Report balance sheet, \$509,176, included unsolicited donations and the proceeds from estates of intestate residents. If we are successful in establishing partnerships and mechanisms for increasing donations and gifts, by the end of 2022 we aim to increase this source of funds to 10 percent of non-appropriated revenue as shown in the Fiscal Year 2017 Performance and Accountability Report statement of changes in net position budgetary financing sources.

Healthcare revenue and offsets

In fiscal year 2017 we did not earn revenue or reimbursements from healthcare services provided to residents. By the end of 2022 we aim to earn \$4.3 million in revenue or reduce or offset our expenses, or a combination thereof. This amount was derived by assuming a 20% reimbursement of wellness center and clinical costs similar to TRICARE coverage, plus Medicare cost sharing coverage for long-term care and memory support.

Appropriations received

Congress provided \$22 million in appropriated funds from the General Fund in fiscal year 2017 as reflected in the Fiscal Year 2017 Performance and Accountability Report statement of changes in net position. We received the same amount in fiscal years 2018 and 2019 and anticipate it again in fiscal year 2020. Through revenue increases and cost reductions, we aim to reduce appropriated support to \$5 million or less in fiscal year 2022 as other revenue sources increase and fill the need to simultaneously meet operational requirements, to address long-standing deferred maintenance needs, and to rebuild the trust fund.

Average of maximum fees to cost

The baseline was calculated by dividing the sum of fiscal year 2018 maximum fees by the sum of costs for each level of care, as reflected in the fiscal year 2019 budget request and used as the basis for fee changes announced in April 2018 to take effect October 2018. By 2022 we expect our maximum fees to be set at cost.

Category 2 & 3 eligible residents

The Fiscal Year 2017 Performance and Accountability Report resident profile which reported 3 percent of residents were category 2 eligible (service connected disability) and 7 percent were category 3 eligible (service in a war theater), 10 percent combined. By 2022 we aim to increase this to 20 percent combined.

Average age

The Fiscal Year 2017 Performance and Accountability Report resident profile reported an average age of 83.2 years. By 2021 we aim to reduce the average by 5 years to 78 through expanded eligibility and improvements in our facilities and services to increase occupancy.

Conclusion

AFRH is a National treasure which exists to care for enlisted members of the military when they need care and support after hanging up their uniforms. This plan builds on comprehensive initiatives taken beginning in 2017 to lay the groundwork for success in the goals and objectives identified over the next three years. AFRH has built a strong leadership team; and, with support from the Department of Defense, we are building relationships with stakeholders to raise awareness of AFRH and its mission. We are working with Congress to make legislative changes in line with our goals. We believe these goals are realistic and achievable steps toward long-term sustainability of AFRH for current and future generations of veterans. Over the next three years we will revisit this plan periodically to measure our progress.

Appendix A

Risk Factors

We are dependent on a few key officials for major decisions

Major decision-making authority is vested in a few key officials including the Chief Executive Officer, Chief Operating Officer, and facility Administrators. If any of these key personnel were to become unavailable, there could be a material adverse effect on our operations.

We need qualified personnel to manage our operations

We need qualified and competent personnel to manage all aspects of our operations which maintain the health and welfare of our predominately elderly and high health risk resident population. Our inability to recruit and retain qualified and competent personnel could negatively affect our operations and performance.

Competition, demographics, and other market conditions may lower our admissions and occupancy rates

Despite our attempts to expand eligibility criteria and marketing efforts, our admissions and occupancy rates are highly dependent on external factors beyond our ability to control including macroeconomic trends, market and technology changes which make our services less relevant or attractive, and our limited geographic service area may continue to erode our occupancy rates and adversely affect our operating results.

Disasters could hurt our operations

Both campuses are at risk for natural and manmade disasters which could impact our operations for an extended period. Both campuses have experienced substantial damage in the recent past by earthquake and hurricane activity which required rapid evacuation and relocation of vulnerable residents and long-term recovery and reconstruction efforts.

Legislative and regulatory oversight could limit our results

We are a Federal government agency with funding and policy decisions made by legislation and operate highly regulated services, particularly in healthcare, and we are required by law to maintain accreditation for all our services. Changes to law, regulation, or nationally recognized practices may require us to expend considerable resources to comply and adversely impact our results. We may request changes to law or regulation to improve our results which may be modified, delayed, or denied.

We rely on services provided by other agencies for key functions

As a small Federal agency we outsource otherwise prohibitively expensive and complex functions and expertise to a limited number of larger Federal agencies offering such services. These functions are critical to our management and operations, including financial management, procurement, human resources and employee relations, legal, information technology, and facilities and real property management. Service changes, reductions, elimination, or significant price increases by these agencies could cause substantial disruption to our ability to operate effectively or manage our administrative costs.

We are exposed to cyber security risks

We are heavily dependent on information technology for all aspects of our operations and manage highly sensitive and regulated personally identifiable information. A significant disruption, failure, theft, or corruption of our data or systems could severely affect our ability to operate, compromise confidential information, and damage our reputation and financial results.

We are or could be a party to legal proceedings

We are a party or could be a party to a variety of legal actions which may have a material impact on our operations and financial condition.

Appendix B

Armed Forces Retirement Home Business Plan 2020

September 2019

Overview

The business plan serves as an extension of AFRH's three-year strategic plan focused on returning to solvency and long-term sustainability. Our corporate and campus leaders add their own input specific to their functional areas, setting short-term goals and objectives for the coming year which support the agency's overall strategic plan. The strategic plan maps our route while the business plan helps us keep track of turns and miles, and adjusting our route as we encounter detours.

The 2020 business plan that follows is divided into our three overall organizations: the corporate headquarters and each of our two campuses in Gulfport and Washington. The corporate headquarters section includes input from each corporate officer, while the campus sections include input from the administrators.

Corporate Headquarters

Chief Operating Officer

Strategic Goal 1 – Quality Care First and Always

Objectives:

1. Ensure organization is right-sized and staffed in every position with personnel who are both qualified and who have positive care-giver attitudes
 - a. Identify and re-structure positions as appropriate
 - b. Ensure all functional areas operate in a “best practice” modality and meet or exceed CARF and The Joint Commission standards
 - c. Modernize facilities and services to accommodate more retiree couples
2. Modernize and upgrade independent living rooms for both singles and couples

Strategic Goal 2 – Stewardship at Our Core

Objectives:

1. Increase occupancy and associated revenues at both campuses
 - a. Increase Washington independent living occupancy by 25% annually until maintaining greater than 90 percent continuous occupancy; increase Gulfport independent living occupancy by 10% annually until maintaining greater than 94 percent occupancy
 - b. Refine marketing, and admissions processes to bring in couples, retired National Guard and Reserve members, and wounded warriors
 - c. Support all initiatives to lease un-used Washington campus buildings

- d. Increase marketing and public affairs activities to reach broader market of eligible veterans
- 2. Achieve budget efficiencies through more economic outsourcing
 - a. Complete transition of contracting to Bureau of the Fiscal Service
 - b. Decrease contracting expenses by 5 percent
- 3. Continue revising and implementing budgeting processes in which campuses develop and manage to their respective budgets; conduct extensive budget reviews to ensure efficient budget planning
- 4. Support all Washington campus initiatives for leasing development zone; integrate development zone planning with Washington master planning for infrastructure, green space, hard space, and amenities
- 5. Increase building and infrastructure renovation program by \$5-10 million annually
 - a. Renovate 4th floor of Sheridan Building to provide larger, modernized living accommodations on the Washington campus
 - b. Continuously seek funding for, and renovate as funds become available, critical Washington campus infrastructure and building systems to include Sheridan Building and chapel elevators, Sheridan roof and replacement chiller, Sheridan roof, and campus-wide electrical, water, and sewer systems

Strategic Goal 3 – Constantly Evolving

Objectives:

- 1. Train staff to more effectively coordinate all staff actions as appropriate
- 2. Develop leadership skills among staff at both campuses to teach, enable, and require managers to resolve issues at the lowest levels
- 3. Improve communications skills throughout staff to build and foster an environment of improved trust between all tiers of staff

Managing Director for Finance and Administration

Strategic Goal 2 – Stewardship at Our Core

Objectives:

- 1. Ensure AFRH continues to obtain unqualified (“clean”) audit opinions
 - a. Provide timely responses to auditors’ requests
 - b. Timely close of the audit cycle to include the Performance and Accountability Report being submitted to the Office of Management and Budget (OMB) by the due date
 - c. Work in concert with the Bureau of Fiscal Service and Washington Headquarters Services (WHS) to ensure accounting information is accurate (e.g. assets are depreciated correctly, revenue is recognized timely, etc.)
 - d. Updated financial management policies (e.g. update policy on procurement actions and payroll activities that occur at WHS but not accounted for in the financial database)
- 2. Provide budgetary oversight to ensure AFRH completes fiscal year within budget

- a. Keep management apprised of FY18 budget execution
 - b. Work with administrators and corporate staff to provide guidance and aide in successful utilization of financial resources
 - c. Formulate future budget requests that are streamlined and will reduce the dependence on receiving annual supplemental funding from Congress
 - d. Prepare persuasive and economical Congressional budget justifications for upcoming applicable fiscal year that will pass OMB scrutiny and be approved by Congress
3. Lead comprehensive and realistic long-range financial planning and revenue forecasting
- a. Work with the Corporate Facilities Manager to forecast revenue and devise a long-term financial plan to regain self-sufficiency and solvency (e.g. leasing, Veterans Administration parking privileges, etc.
 - b. Work with the Administrators to ensure that delinquent resident fee accounts are handled appropriately (e.g. having hearings, assigning conservators, sending delinquent debt to Treasury for collection, etc.)
 - c. Work collaboratively with the Public Affairs Officer to forecast resident fee revenue for the out-years
 - d. Explore fundraising opportunities
 - e. Assist management in engaging the Department of Defense in increasing voluntary allotments that are received from active duty military personnel

Chief Medical Officer

Strategic Goal 1 – Quality Care First and Always

Objectives:

- 1. Promote quality care through a healthcare staff that is credentialed, privileged, and licensed to perform in their scope of duty
- 2. Maintain quality indicators of continued accreditation by both The Joint Commission and CARF
- 3. Evaluate and coordinate with COO, Agency, and campuses feasibility of added levels of care and services

Strategic Goal 2 – Stewardship at Our Core

Objectives:

- 1. Analyze implementation various healthcare services reimbursement pathways as possible in compliance with applicable guidance
- 2. Support continuation of medical quality under the planned decreased operating expenses of 5 percent at both campuses and commensurate with resident census levels and complexity of care levels with efficient healthcare staffing levels and licensure categories at both campuses.

Strategic Goal 3 – Constantly Evolving

Objectives:

1. Promote Medical Quality Management through identifying relevant, up to date medical information and continuing medical education for licensed healthcare providers that are cost free
2. Coordinate with Senior Medical Advisor regarding recommendations and implementing components as determined indicated and feasible within current budgets and staffing and in alignment with goals, including, but not limited to electronic health record systems, pharmacy systems, and others

Corporate Facilities Manager

Strategic Goal 1 – Quality Care First and Always

Objectives:

1. Modernize facility and amenities of Washington campus
 - a. Develop bridge drawings for new Sheridan Building rooms
 - b. Procure construction services to renovate Sheridan floors
 - c. Develop plan and solicitation package to replace primary electric switch gear
 - d. Begin updating facility mechanical equipment

Strategic Goal 2 – Stewardship at Our Core

Objectives:

1. Convert un-used Washington campus space to revenue producing property
 - a. Work with negotiation team for 80 acres lease
 - b. Develop permitting process and policies for 80-acre development
 - c. Define governance of 80-acre development
 - d. Move water and sewer lines out of development zone
2. Generate revenue through enhanced property usage
 - a. Work toward utilizing or renting Quarters 4, 9, 41 and 90
 - b. Begin transitioning current Sheridan Building antenna tenants to market value rent-paying leases
 - c. Begin to develop concepts adaptive reuse of the Grant Building
3. Meet and maintain compliance standards
 - a. Worked to better waste management solutions
 - b. Submit sustainability, environmental, preservation, and real property reports on time to external agencies
 - c. Work to achieve greater energy efficiencies for both campuses

Director of Real Estate

Strategic Goal 2 – Stewardship at Our Core

Objectives:

1. Manage selection process for lead developer for underused parcel on Washington campus
 - a. Coordinate activities and schedule with General Services Administration
 - b. Lead master lease negotiations with selected developer
 - c. Negotiate jurisdiction and governance with DC government
 - d. Share progress with AFRH leadership
 - e. Facilitate Management Review Committee
2. Develop a strategic vision for 2035, with focus on branding, industry trends, and needs and interests of future generations of residents
 - a. Guide and constrain real estate decisions in support of the mission of the AFRH and its residents, particularly at the Washington campus
 - b. Identify anticipated future uses for existing assets in the AFRH Zone of the Washington campus
 - c. Develop concepts and timelines that advocate the vision to relevant stakeholders, including DOD, OMB, Congress, and relevant partners
3. Begin conceptualization and design for renovation of the Grant Building

Strategic Goal 3 – Constantly Evolving

Objectives:

1. Build on internship program with Norwich University
 - a. Develop lessons learned following initial semester
 - b. Identify opportunities and mentors for future interns
 - c. Collaborate with Norwich on 1-year architecture internship
2. Support Chief Information Officer in re-design of the AFRH.gov website
 - a. Implement the requirements of the 21st-Century Integrated Digital Experience Act (IDEA), offering mobile-friendly digital options for all paper-based forms (e.g., admissions), making customer experience a priority through new processes and improved workflow, and accelerating the use of electronic signatures in admissions
 - b. Support admissions process redesign by 31 Dec 2019 and incorporate in website redesign
 - c. Incorporate building permit and certificate of occupancy processes in redesign by 30 Jun 2020

Chief Human Capital Officer

Strategic Goal 1 – Quality Care First and Always

Objective:

1. Evaluate cost efficiency of eliminating dental contract in DC and restoring to in-house function

Strategic Goal 2 – Stewardship at Our Core

Objectives:

1. Transition outsourced services to most cost-effective provider
2. Evaluate changing personnel service and Equal Employment Opportunity service providers
3. Evaluate changing payroll service provider

Strategic Goal 3 – Constantly Evolving

Objectives:

1. Ensure managers and supervisors have state of the art tools to efficiently initiate and manage personnel actions for staff members
 - a. Validate employee personal information in *HR Connect* database
 - b. Update telework designations for positions and employees
 - c. Survey staff to update self-identified handicap codes
2. Focus on continuous staff professional development
 - a. Develop a mutually rewarding contract bargaining agreement (CBA) from the memorandums of agreement at the Gulfport facility
 - b. Renegotiate the CBA at the Washington facility for AFGE Local 3090, last negotiated in May 2005

Chief Information Officer

Strategic Goal 1 – Quality Care First and Always

Objectives:

1. Work with WHS on solicitations for new requirements including: Resident SaTV and Internet services, guest room tracking software, and records information management
2. Evolve the electronic health records system to meet Joint Commission requirements and workflow development
 - a. Facilitate working group sessions with Ensoftek developers and campus healthcare staff to identify requirements for program changes, particularly for care plans and incident reporting
 - b. Provide funding for staff “super user” training
 - c. Deploy equipment for mobile charting for upper levels of care

Strategic Goal 2 – Stewardship at Our Core

Objectives:

1. Maintain effective and appropriate IT contracts and interagency agreements
2. Monitor and assist effective transition of contracts to WHS
3. Ensure agency meets all reporting requirements in a timely manner
4. Ensure mandatory reporting as required by OMB and Department of Labor are completed and submitted to governing agencies as required, including:
 - a. FISMA – Federal Information Management Act (OMB)
 - b. PIA – Privacy Impact Assessment (OMB)

- c. Risk Assessment (OMB)
- d. OSH – Occupational Safety and Health Report (OSHA)

Strategic Goal 3 – Constantly Evolving

Objectives:

1. Ensure AFRH information systems maintain compliance and compatibility with appropriate government systems
2. Implement NARA standards for Records Management Self-Assessment and NA-1005 – Capstone Email Archiving
3. Upgrade infrastructure and network authentication
 - a. Lifecycle desktop replacement for the Gulfport facility
 - b. Monitor upgrades for the Washington facility
 - c. Secure Wi-Fi implementation and mobile charting deployment
 - d. Transition to Multifactor (PIV Card) authentication to network resources for federal staff
 - e. ISDN distribution equipment upgrade for Washington administrative voice services

Public Affairs Officer

Strategic Goal 1 – Quality Care First and Always

Objectives:

1. Increase Washington independent living occupancy by 25 percent annually until maintaining greater than 90 percent continuous occupancy; increase Gulfport occupancy by 10 percent annually until maintaining greater than 94 percent continuous occupancy
2. Refine marketing, and admissions processes to enroll couples, retired National Guard and Reserve members, and wounded warriors
3. Increase marketing and public affairs activities to reach broader market of eligible veterans.
 - a. Refine and expand annual paid advertising program in military retiree publications and target civilian news outlets to include eligible spouses, retired National Guard and Reserve members, and wounded warriors
 - b. Leverage DOD contacts to ensure placement of cost-free advertising in retiree publications, and focus on eligible spouses, retired National Guard and Reserve members, and wounded warriors
 - c. Expand exhibiting opportunities to include national veteran conventions and events and retiree appreciation day programs at military bases across the country, and focus on eligible spouses, retired National Guard and Reserve members, and wounded warriors
4. Achieve additional efficiencies and cost-savings in existing marketing programs and application processing

- a. Leverage use of staff at each campus to represent AFRH at national veterans meetings and retiree appreciation programs, and conduct pre-admissions outreach and processing of applications
 - b. Train staff in marketing strategies and screening applicants for eligibility, minimizing unnecessary mailing costs and encouraging applicants to utilize documents on AFRH website
5. Update printed marketing materials and web page
- a. Create new printed marketing materials to reflect evolving mission requirements
 - b. Redesign AFRH web site to provide updated information in a more user-friendly format, and to enhance user and applicant experience
6. Encourage external stakeholder commitment to AFRH
- a. Conduct outreach to state-level veteran service and military service organizations to promote AFRH among their members
 - b. Conduct outreach to senior non-commissioned officers in DOD and National Guard and Reserves to promote knowledge and support of AFRH among current service members

Executive Support Services Officer

Strategic Goal 1 – Ensure AFRH benefits from best-qualified and supportive Advisory Council

Objectives:

- 1. Ensure AFRH Advisory Council meetings are scheduled and held twice yearly per statute
- 2. Ensure all member appointment letters are issued in a timely manner and filed accordingly
- 3. Ensure congressionally mandated reports are professionally prepared, and submitted on time

Strategic Goal 2 – Minimize/eliminate backlog of DOD Inspector General, CARF, Joint Commission and other external agencies

Objectives:

- 1. Track and respond to DoDIG open recommendations from AFRH Directors/ Directorates in a timely manner to meet critical deadlines

Strategic Goal 3 – Ensure both AFRH Washington and Gulfport Campuses maintain and update standard operating procedures, directives, and notices according to National Archives and Records Administration guidelines

Objectives:

- 1. Ensure suspense, review, edit and ensure all data is up to date and posted to SharePoint
- 2. Ensure both campuses conduct annual reviews of data to ensure the most current data is available to all employees

Inspector General and Director of Security and Safety – Washington

Strategic Goal 1 – Promote Economy, Efficiency and Effectiveness in AFRH Programs and Operations

Objectives:

1. Conducts audits, investigations and other reviews of priority issues to assist AFRH to fulfill its mission more effectively and efficiently
2. Complete planned audits and issue reports in a timely and effective manner
3. Audit chaplains funds for both campuses in conjunction with the Director of Finance and Administration
4. Audit resident funds for both campuses in conjunction with the Bureau of the Fiscal Service
5. Investigate and issue report promptly within two weeks on high priority complaints and referrals

Strategic Goal 2 – Detect and Deter Fraud, Waste and Abuse in AFRH's Programs and Operations

Objectives:

1. Heighten integrity awareness of AFRH employees and others
2. Publish at least one article in the AFRH *Communicator* or flyers briefing residents, employees and others on integrity

Strategic Goal 3 – Ensure Security and Safety maintain compliance with DoDIG, TJC and CARF Standards

Objectives:

1. Strengthen internal security and safety compliance with DoDIG, the Joint Commission and CARF
2. Communicate effectively with AFRH and other stakeholders to ensure all required actions from DoDIG, TJC, and CARF findings are corrected and remain in place

Strategic Goal 4 – Establish new relationships to expand AFRH's knowledge for security and safety best industry practices

Objectives:

1. Research internal security and safety compliance with DODIG, The Joint Commission, and CARF
2. Communicate effectively with AFRH and other stakeholders to ensure all required actions from DoDIG, TJC, and CARF findings are corrected and remain in place



Armed Forces Retirement Home - Gulfport

Administrator

Strategic Goal 1 – Quality Care First and Always

Objectives:

1. Continue to preach, teach, and live the mission and the vision of the home
2. Continue and promote the engagement of staff from all departments with our residents
3. Continue to meet and exceed the standards set forth by our agreements with CARF and The Joint Commission
4. Continue to work with residents to keep them residing here instead of moving to other communities
5. Provide resident centered care and excellent services to keep the residents we have to age in place
6. Support the efforts of Public Affairs and the Admission Officer at Gulfport to increase occupancy to 95 percent by June 30, 2020
7. Work with Chief of Healthcare Services, Director of Nursing, and clinical nurse supervisors to increase federal nurse staff to eliminate need for nursing contracts
8. Right-size and staff in every department with personnel who are both qualified and who have positive and caring concern for senior adult veterans

Strategic Goal 2 – Stewardship at Our Core

Objectives:

1. Work with all service chiefs and their teams to implement ways to reduce spending and manage costs to reduce the gap between revenue and expenses
2. Work with the agency to improve the budget process for our business center and service chiefs

Strategic Goal 3 – Constantly Evolving

Objectives:

1. Continue annual training for staff by the agency
2. Work with healthcare professionals from the coastal area to provide in-services for employees
3. Create memorandum of understanding with labor union to be grievance-free



Armed Forces Retirement Home - Washington

Administrator

Strategic Goal 1 – Quality Care First and Always

Objectives:

1. Provide an environment that delivers Person Centered Care, embracing the values of choice, dignity, respect, self-determination and purposeful living
 - a. Provide quality healthcare to residents on all levels as evidenced by CARF and TJC accreditations by maintaining a focus on quality
 - b. Ensure compliance with all DoDIG requirements
2. Improve infrastructure on an incremental basis to modernize resident rooms
 - a. Research and evaluate improved beds and mattresses in higher levels of care
 - b. Develop plan for life cycle management of equipment, furniture and mattresses for all levels of care
3. Increase to greater than 90 percent continuous occupancy with steady increases each year
 - a. Participate in outreach initiatives to veteran groups and other venues to market AFRH
 - b. Educate staff to speak to the value of living at AFRH
4. Ensure organization is right-sized and staffed with personnel who embrace Person-Centered Care
 - a. Identify and re-purpose positions as appropriate
 - b. Assess and right-size staffing with qualified individuals who have positive care-giver attitudes
5. Network with supporters of AFRH including VA, Walter Reed National Military Medical Center, Creative Minds International School, and others

Strategic Goal 2 – Stewardship at Our Core

Objectives:

1. Revise and implement budgeting processes down to the manager level.
 - a. Require budget owners to efficiently manage their respective budgets
 - b. Conduct extensive budget reviews to ensure efficient budget planning
2. Decrease reducing operating expenses by 5 percent with staffing, supply and contracting efficiencies
3. Support all Washington campus initiatives for leasing in the development zone
4. Support initiatives for individually leasing non-development zone buildings

Strategic Goal 3 – Constantly Evolving

Objectives:

1. Mentor and develop leadership skills among staff to teach, enable, and require managers to resolve issues at the lowest levels
2. Improve communications skills throughout staff to build and foster an environment of improved trust between all levels of staff
3. Find ways to demonstrate appreciation to staff to increase morale
4. Invest in staff with training so they can more effectively coordinate all staff actions and budgeting as appropriate