



## Mountain Meadows Assisted Living Leavenworth, Washington



### THE ORGANIZATION

Mountain Meadows is an assisted living facility located in the storied Bavarian village of Leavenworth, Washington. It provides high quality care in a home-like atmosphere for its residents. Founded in 1996 by Presbyterian Retirement Communities Northwest, the 28-unit facility was acquired by a community group in 2002 with the assistance of Senior Services of America, LLC. Senior Services of America was then hired to provide management and administrative services for operations. They put a new management team in place.

### THE CHALLENGE

Original financing for the facility included funds from the State of Washington. These funds carried the stipulation that a majority of the beds would be available for Medicaid patients. With only 28 units, Mountain Meadows is generally considered too small to operate profitably with this Medicaid stipulation. The original ownership group suffered substantial operating losses and had decided to close the facility. A community group was formed and a reduction in the Medicaid requirement to 50% of available beds was negotiated. A drive to fill the capacity was begun by the new management team. In the meantime, many ideas were being generated to create new revenue streams. However, these efforts lacked focus and a common understanding of the organization's core purpose.

### THE SOLUTION

Upstream Northwest was brought in to lead Mountain Meadows' board of directors and management team in a process to develop a clear and compelling vision for the organization followed by the development of a strategic plan to achieve that envisioned future.

Upstream used a process that encouraged everyone's participation and buy-in, says Randy Trettevik, Senior Service of America's CFO and Mountain Meadows board member. They led us

### THE RESULTS

Mountain Meadows now has a clear understanding of both its **core purpose** (*what it is*) and its **courageous goal** (*where it wants to go*). In the six months since the Mountain Meadows strategic plan was completed, the organization has achieved several milestones:

- As a result of its focus on filling the facility and containing costs, Mountain Meadows has broken the years-long record of losses and is now profitable. This was accomplished in spite of the challenges imposed by the size limitations and the Medicaid requirement. This is testimony to the focus and sheer efforts of the management team and staff at Mountain Meadows.
- New opportunities are now measured against the organization's mission and goal. At every board meeting we used to discuss ideas over and over. Now we have prioritized the things we need to get done. That helps us judge new opportunities. Those that fit the mission and advance the organization towards its goal get done. Those that do not fit are rejected. This focus has saved time and resources throughout the organization, says Trettevik.
- Clear goals for expansion of the facilities have been set. The organization has begun assessing the market and planning the design and financing of a new dementia wing.
- The organization has begun organizing for fundraising. Our strategic plan is an essential part of our presentation to funding sources, says Trettevik, it is a great tool when trying to explain to others what we do and where we want to go.
- The board has set a goal to strengthen its governance structure. This includes setting expectations for performance. The plan has helped us establish benchmarks for evaluating the



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**“I keep our strategic plan on my desk. It helps keep me focused on doing the things each day that will move us towards our objectives.”**

Randy Trettevik

Senior Services of America CFO and Mountain Meadows board member