

Pilgrim Place Strategic Planning

Resident Input Summary for Board Retreat

24 July 2025

Executive Overview

Comprehensive Resident Engagement in this Exercise

- **Town Hall Meeting:** June 30, 2025 - Structured discussion format
- **Resident Survey:** 147 responses including on-line and hard copies (45% response rate)
- **Combined Input:** This dual approach captured information from a broad cross-section of residents.

Key Finding: Unity of Vision

Both the Town Hall and survey revealed remarkable consistency in resident priorities and concerns, demonstrating a widely-shared sense of strategic direction.

Central Theme

Residents seek **financial sustainability that preserves mission and values** - not an either/or choice, but an integrated approach that strengthens both fiscal health and community identity.

Question 1 - Strategic Priorities (Next 5 Years)

Financial Sustainability - A Top Priority for a Large Majority

- **Survey:** A large majority of residents identified financial stability as top concern
- **Town Hall:** Emphasized "achieving financial stability without always asking residents for more money"

Values-Mission Integration

- **Survey:** Many residents prioritized preserving intentional community character
- **Town Hall:** Strong consensus on maintaining "beloved community" identity

Key Resident Insights:

- Financial stability must be achieved **without compromising core values**
- Need for **alternative funding sources** beyond resident fees
- Importance of **values-based admissions** over wealth-based decisions
- Demand for **transparent strategic planning process** with resident input

Strategic Tension Identified:

- ▶ *"We want to be a sustainable community, but at what cost?"* - Resident voices reveal sophisticated understanding of the balance required.

Question 2 - CEO Priorities (Next 12 Months)

Financial Stabilization Takes Precedence

- **Survey:** Many residents want immediate financial initiatives
- **Town Hall:** Multiple calls for addressing revenue shortfalls

Infrastructure and Leadership Development

- **Survey:** Some residents prioritize staffing solutions
- **Town Hall:** Emphasis on "building a stable, quality management team"

Community-Centered Leadership

- **Survey:** Some residents want wider community engagement
- **Town Hall:** "Listen to the heart of the residents" as top priority

Specific Action Areas:

1. **Health Services Center/Memory Care** - Multiple residents see sustainability as a challenge
2. **Person-centered care** across all levels
3. **Values-based recruitment** and admissions
4. **Professional marketing strategy** development, including outreach to younger cohorts

Leadership Philosophy:

- ▶ Residents want a CEO who balances executive authority with genuine community listening.

Question 3 - Competitive Advantages

Mission-Driven Identity - Our Strongest Asset

- **Survey:** Most residents cite intentional community character
- **Town Hall:** "Our ethos of values - social justice, peace, care for earth and each other"

Unique Social Architecture

- **Survey:** Many residents highlight community dining structure
- **Town Hall:** "Computer-generated randomized seating prevents cliques, builds relationships"

Physical and Cultural Environment

- **Survey:** Many residents cite beautiful campus and location
- **Town Hall:** "We look like a neighborhood, not an institution"

Staff Quality and Retention

- Both Town Hall and survey responses emphasized dedicated staff who "see Pilgrim Place as family"

The "Festival Advantage"

- Unique programming that attracts and engages broader community surrounding Pilgrim Place

Key Message:

- ▶ Pilgrim Place's advantages are **values-driven and relationship-centered** - difficult for competitors to replicate.

Question 4 - Barriers and Threats

External Pressures

- **Survey:** Economic uncertainty and market competition
- **Town Hall:** "Hate in the world," Medicare/Medicaid cuts, climate change

Internal Challenges - Culture Change

- **Survey:** Many residents are concerned about balancing tradition with change
- **Town Hall:** Better recognizing existing diversity, while striving for more diverse population

Financial Sustainability Risks

- **Survey:** Many residents cite rising costs and fee competition
- **Town Hall:** Warning from some against "luxury expenses that aren't necessary"

Security and Operations

- **Survey:** Some residents identify campus security, health and safety concerns
- **Town Hall:** Need for measurable strategic goals

The Growth Paradox:

- ▶ *Expanding the campus may risk to diminish our sense of community* - Residents understand the delicate balance of sustainable growth.

Question 5 - Greatest Opportunities

Network-Based Growth Strategy

- **Survey:** Many residents see wider community partnerships as a key opportunity
- **Town Hall:** "Our friendship networks" and professional connections

Mission-Market Alignment

- **Survey:** Some residents want to market values-based community appeal
- **Town Hall:** "Market Pilgrim Place as something different", including attracting younger cohorts as one part of the mix of new residents

Financial Diversification

- **Survey:** Many residents expressed support for legacy/estate planning enhancement
- **Town Hall:** Multiple funding streams sought beyond resident fees

Creative Positioning Ideas

- **1st Saturdays/Festival Marketing Inform Opp:** E.g., "Did you know PP welcomes non-clergy?"
- **International outreach** leveraging heritage connections
- **College partnership expansion** given proximity advantages

Innovation Mindset:

- ▶ Residents demonstrate willingness to consider significant changes while preserving essential character.

Strategic Themes - What We Heard

1. Values-Financial Integration

Residents reject the false choice between mission and money - they want creative solutions that strengthen both.

2. Network-Powered Growth

Sophisticated understanding that sustainable growth comes through relationships, not just traditional marketing.

3. Quality Over Quantity

Preference for excellence in management of existing operations, over extensive expansion.

4. Community-Centered Innovation

Openness to change (including name, partnerships, facilities) when it serves community values.

5. Transparency and Participation

Strong desire for clear planning processes with meaningful resident input.

6. Person-Centered Everything

- From care delivery to admissions to leadership - relationships matter most.

Resident Sentiment Analysis

What Residents Love:

- **Intentional community identity** - "These are my people"
- **Values-driven culture** - social justice, peace, care for the earth, care for each other
- **Community dining and fellowship** - "Heart of our community"
- **Beautiful, non-institutional campus**
- **Dedicated staff** who care deeply

What Residents Fear:

- **Financial unsustainability** threatening community survival
- **Values dilution** through wealth-focused admissions
- **Loss of intimacy** through inappropriate growth
- **Leadership instability** affecting long-term planning

What Residents Want:

- **Professional marketing** that attracts values-aligned residents including younger cohorts as one part of the mix
- **Alternative funding** beyond increasing resident fees
- **Transparent processes** with meaningful input opportunities
- **Creative solutions** that honor tradition while enabling adaptation
- ▶ **Overall Tone: Realistic optimism with deep commitment to community success.**

Implementation Priorities

Immediate Actions (6-12 Months)

1. **Financial stabilization** including enhanced fundraising and cost management
2. **Professional marketing strategy** targeting values-aligned prospects including younger cohorts as one part of the mix
3. **Staffing solutions** for retention and recruitment
4. **Health Services Center/Memory Care evaluation** for sustainability
5. **Transparent strategic planning process** with resident engagement

Medium-Term Initiatives (1-3 Years)

1. **Values-based admissions process** revision
2. **Alternative funding sources** development
3. **Outreach** beyond Claremont geography
4. **Campus security improvements** while maintaining openness
5. **Non-resident engagement** program exploration

Long-Term Vision (3-5 Years)

1. **Comprehensive strategic plan** with measurable goals
2. **Mission-market alignment** through targeted growth
3. **Financial model diversification** beyond resident fees
4. **Community partnerships** expansion
5. **Legacy planning** program enhancement

Considerations for the CEO and Board

Strategic Questions for Board Consideration:

1. Financial Strategy

- How do we balance immediate financial needs with long-term sustainability?
- What alternative funding sources should we prioritize?

2. Growth Philosophy

- What size and growth preserves community character?
- How do we maintain intimacy while ensuring viability in terms of scale?

3. Values Integration

- How do we operationalize values-based admissions?
- What changes serve mission without compromising identity?

4. Leadership Structure

- What governance changes strengthen resident engagement?
- How do we ensure strategic plan implementation continuity?

Next Steps:

1. **Board retreat decisions** on priority initiatives
2. **CEO strategic plan development** with resident input mechanisms
3. **Timeline establishment** for implementation phases
4. **Success metrics definition** for progress measurement

Resident Message to Board:

- *We welcome the opportunity to work for our mission, within our means* - Residents are ready to support bold, values-aligned decisions that ensure Pilgrim Place's sustainable future.